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NAFA Fleet Executive

The Magazine for Vehicle Management
October 1988

**Results of NAFA's
1989 Model Year
Acquisition Survey...
Page 6**

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Cover design by Jeff Calvert

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This annual poll will show you what types and sizes of vehicles will be in service in the upcoming years, which options fleet managers would like in their vehicles, what factors are taken in to consideration when ordering vehicles, and much more.

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Remember the Oscar Mayer Wienermobile from days of old? They're back and NAFA has the scoop on them.

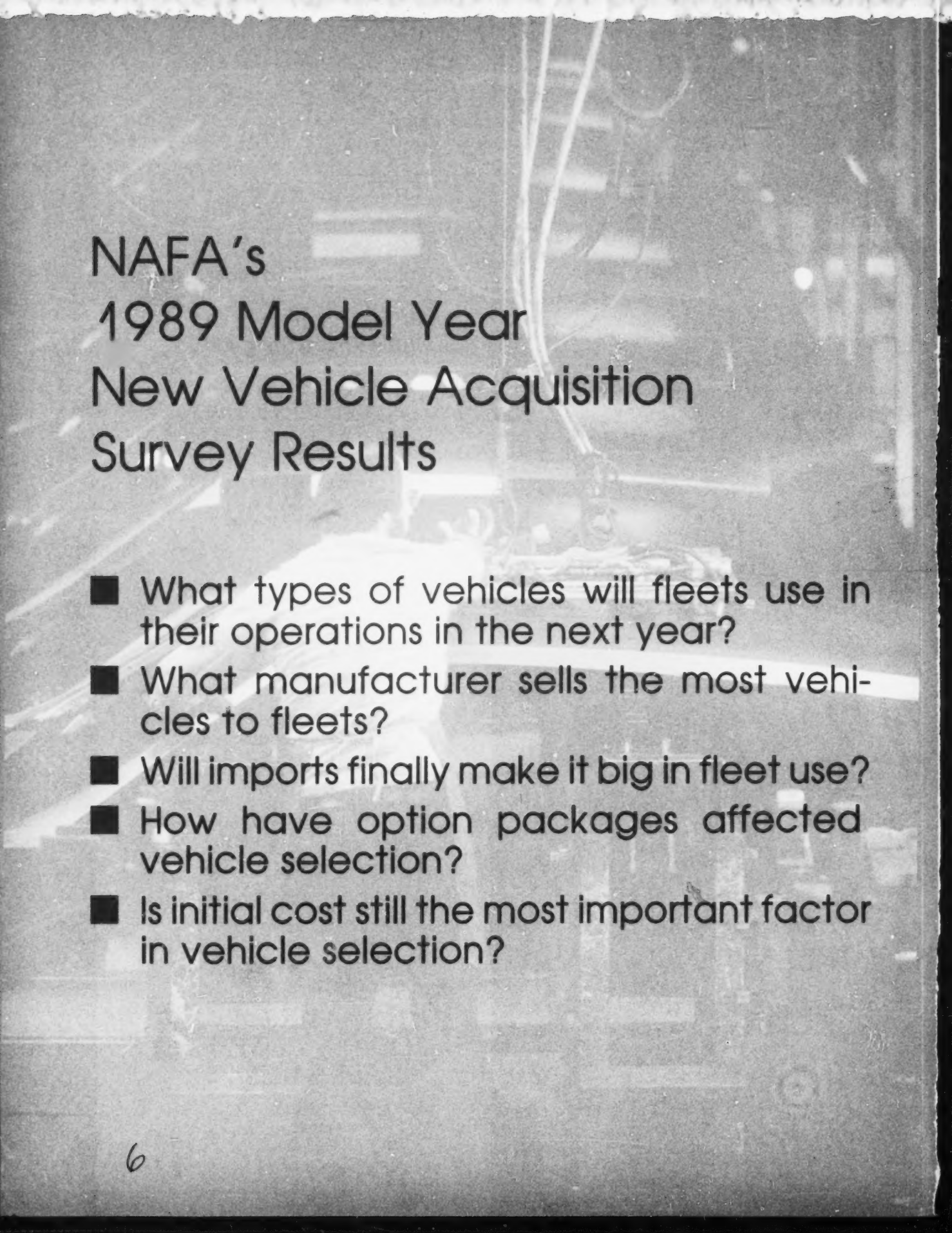
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NAFA's 1989 Model Year New Vehicle Acquisition Survey Results

- What types of vehicles will fleets use in their operations in the next year?
- What manufacturer sells the most vehicles to fleets?
- Will imports finally make it big in fleet use?
- How have option packages affected vehicle selection?
- Is initial cost still the most important factor in vehicle selection?

Fleets in the United States and Canada will purchase or lease more than 126,000 1989 model year vehicles—at a cost of more than \$1.6 billion—during the upcoming months, according to results of NAFA's most recent New Vehicle Acquisition Survey.

Of the 126,668 1989 model year vehicles being purchased or leased, fleet managers said 73 percent will be automobiles, 14 percent will be light-duty trucks and 13 percent will be vans. Managers said they expect to pay an average of \$12,804 for each car, \$13,346 for each light-duty truck and \$13,352 for each van. At those costs, fleets will pay a total of \$1,640,637,394 for the 1989 vehicles they purchase.

Fleet managers already placing orders for 1989 models (more than half of respondents claim to order and take delivery of new vehicles in the fall) said General Motors Corporation received 34 percent of their orders, Ford/Lincoln-Mercury slightly more than 30 percent (30.3) and Chrysler/Jeep just more than 18 percent (18.1). Most of the remaining fleet managers did not specify any particular manufacturers since their drivers, who choose which vehicles they will drive, had not yet turned in their selectors.

Import manufacturers (Isuzu, Toyota, Mazda, Honda, Acura, Nissan, Mitsubishi, Volkswagen, Subaru and Hyundai) combined will receive less than one percent of all 1989 model year fleet orders, according to responding fleet managers.

Most of the responding fleets (61 percent) do not plan any changes in their fleet size or buying/leasing policies within the next year. Of those who do plan changes, however, nine percent said they will lease vehicles they previously purchased, three percent said they will purchase vehicles they previously leased, and one percent said they will divest most of their fleet to employee ownership. Also, of those planning changes, 21 percent said they will increase the size of their fleet while five percent said they will decrease the size of their fleet.

Similarly, 92 percent of respondents said they do not plan a change in the size or type of vehicles in their fleets. The most frequent response by those planning changes in either of these areas was a move from mid-size to compact units (this response, however, was given by only one percent of respondents).

IMPORTS IN FLEETS

For 279 fleet managers "an unwritten, but perceived, 'buy North American' policy" was the

reason given for *not* ordering import vehicles for their fleets. Fifty-four fleet managers said they, personally, would rather buy North American vehicles for their fleets but that their company has no written or perceived "buy North American" policy. And, 53 fleets, most in the public service sector, have corporate or agency written policies against buying import vehicles. Among other reasons given for not purchasing imports for fleet use were: high initial cost; incompatibility for job applications; size (too small); service difficulties; high repair costs; and poor means of distribution.

For the few fleet managers purchasing imports, the most often cited reason for doing so was "driver preference." Other reasons given were: better quality/workmanship; lower cost; better fuel economy; higher resale value; and better overall value.

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GEOGRAPHICAL SURVEY RESPONSES

Fleets with primary operations in United States	414	(87%)
Fleets with primary operations in Canada	62	(13%)
Total Fleets Responding	476	(100%)

COMMERCIAL FLEETS RESPONDING

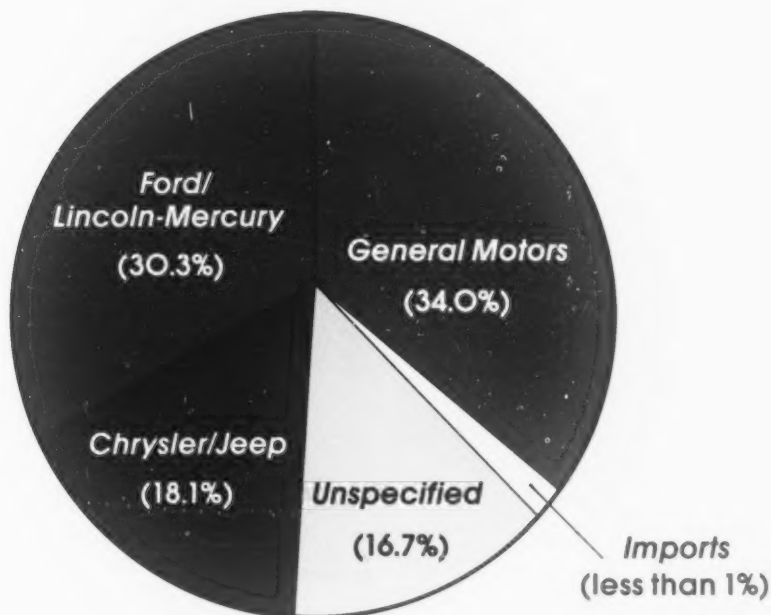
Industrial Manufacturing . . .	61
Insurance	56
Consumer Manufacturing . . .	52
Drugs & Cosmetics	47
Chemical & Petroleum	36
Food & Beverage	34
Service Organization	28
Banking/Financial	18
Communications	14
Electronics	7
Other	16
Total Commercial Fleets Responding	369 (77.5%)

PUBLIC SERVICE FLEETS RESPONDING

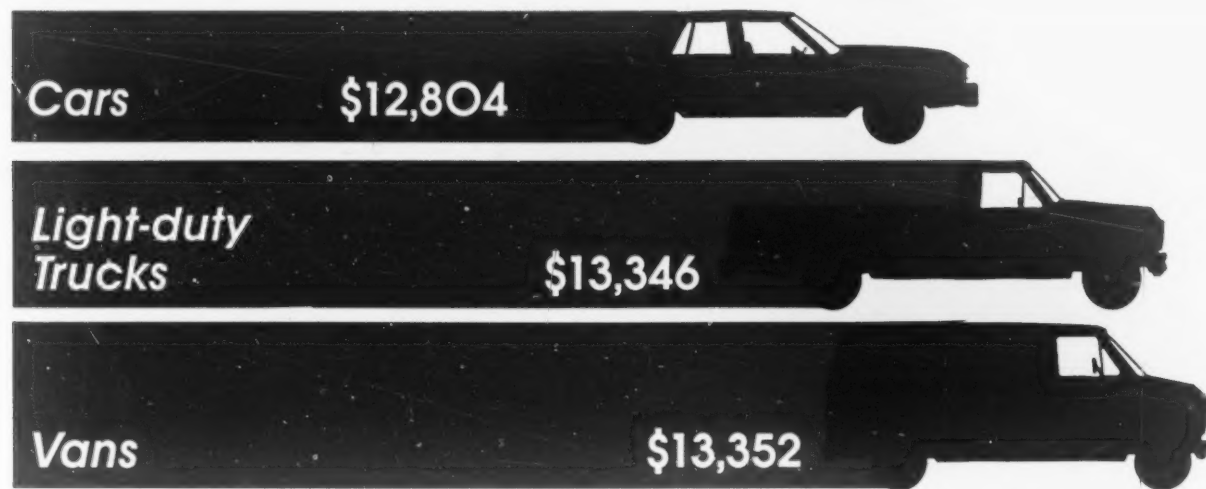
Government	48
Public Utility	37
Law Enforcement	22
Total Public Service Fleets Responding	107 (22.5%)

TOTAL FLEETS RESPONDING . 476 (100%)

Who Are Fleets Buying From?



Expected 1989 Model Vehicle Purchase Prices



(continued on page 12)

FLEET OPTION PACKAGES

After all the controversy, exactly how have "mandatory" option packages affected fleet operations?

From a vehicle selection standpoint, option packages seem to have had some affect on which vehicles fleet managers use in their fleets, but not enough to completely disqualify a vehicle from their selector lists, according to results.

Sixty-eight percent of fleet managers saying option packages affected their vehicle selection said they chose the same vehicle as in the past, but with more equipment; eight percent chose

the same vehicle with less equipment. In other words, nearly three-quarters of these respondents were "brand-loyal," suggesting a strong sense of faithfulness to both the vehicle model and manufacturer. (Eighteen percent of these respondents said they chose a different model or manufacturer than in the past to get the desired optional equipment.)

From a cost standpoint, 62 percent of responding fleet managers said option packages have caused them to pay more money than in the past for optional equipment in their vehicles.

OPTIONS WISH LIST

If fleet managers could have their choice of options in a vehicle, here's what they would have, according to survey results:

VEHICLES IN FLEETS RESPONDING

Industry Classification	Company-Owned	Leased	Total
Commercial Fleets			
Industrial Manufacturing	11,907	48,209	60,116
Insurance	26,261	22,119	48,380
Chemical & Petroleum	19,959	24,399	44,358
Drugs & Cosmetics	1,788	33,698	35,486
Consumer Manufacturing	10,402	24,628	35,030
Service Organization	11,307	15,456	26,763
Food & Beverage	6,576	19,920	26,496
Banking/Financial	5,503	2,345	7,848
Communications	1,653	4,004	5,657
Electronics	2,166	1,973	4,139
Other	1,682	4,637	6,319
Total Commercial Fleets:	99,204 (33%)	201,388 (67%)	300,592 (100%)

Vehicles in commercial fleets represent 63% of all vehicles in this survey.

Public Service Fleets			
Public Utility	58,665	32,741	91,406
Government	63,873	1,194	65,067
Law Enforcement	20,728	116	20,844
Total Public Service Fleets	143,266 (81%)	34,051 (19%)	177,317 (100%)

Vehicles in public service fleets represent 37% of all vehicles in this survey.

TOTAL VEHICLES IN SURVEY	242,470 (51%)	235,439 (49%)	477,909 (100%)
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- Power Brakes
- Automatic Transmission
- Dual Side Mirrors
- Power Steering
- Air Conditioning
- Tinted Glass
- All-Season Tires
- Floor Mats
- Rear Defroster
- Fuel Injection
- Pulse Wipers
- AM/FM Radio

Those options not high on fleet managers' wish lists, according to results, are: cellular phone; vinyl roof; power gas cap release; mud guards; power seats; power trunk release; optional paint; power windows; four cylinder en-

gine; AM/FM cassette stereo; power door locks; and split front seat.

RESPONDENT DEMOGRAPHICS

NAFA's 1989 Model Year New Vehicle Acquisition Survey received responses from 476 fleet managers: 414 from the United States and 62 from Canada. More than three-quarters of the responses (369) were from commercial fleets, with the remaining from public service fleets.

All told, responding fleets control 477,909 vehicles: 242,470 company-owned and 235,439 leased. Fifty-nine percent of these vehicles are automobiles, 19 percent are light-duty trucks, 13 percent are vans and nine percent are "other" vehicles, such as heavy-duty trucks.

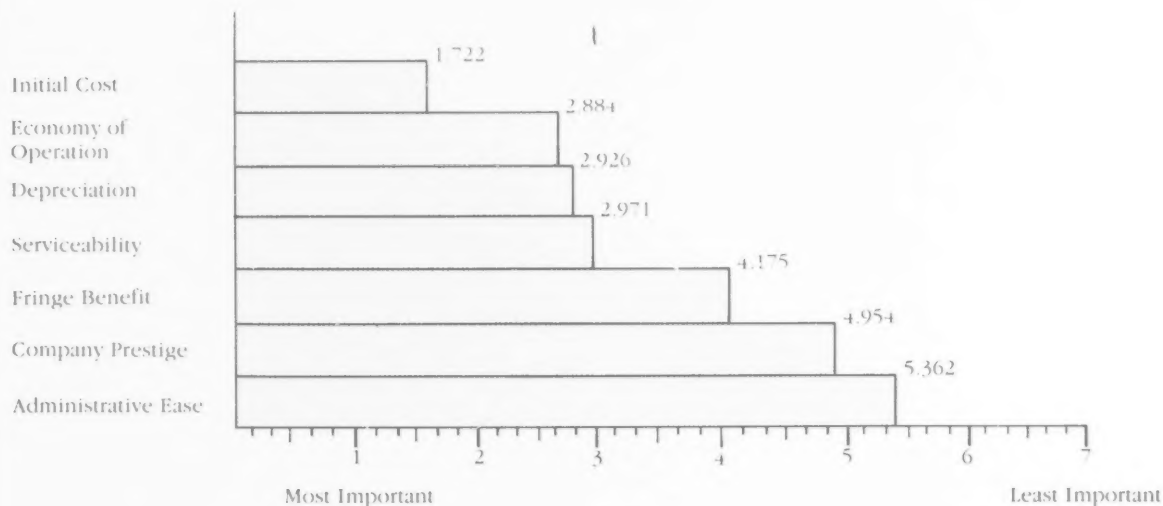
More statistics on following page.

WHY DO YOU CHOOSE THE VEHICLES YOU CHOOSE?

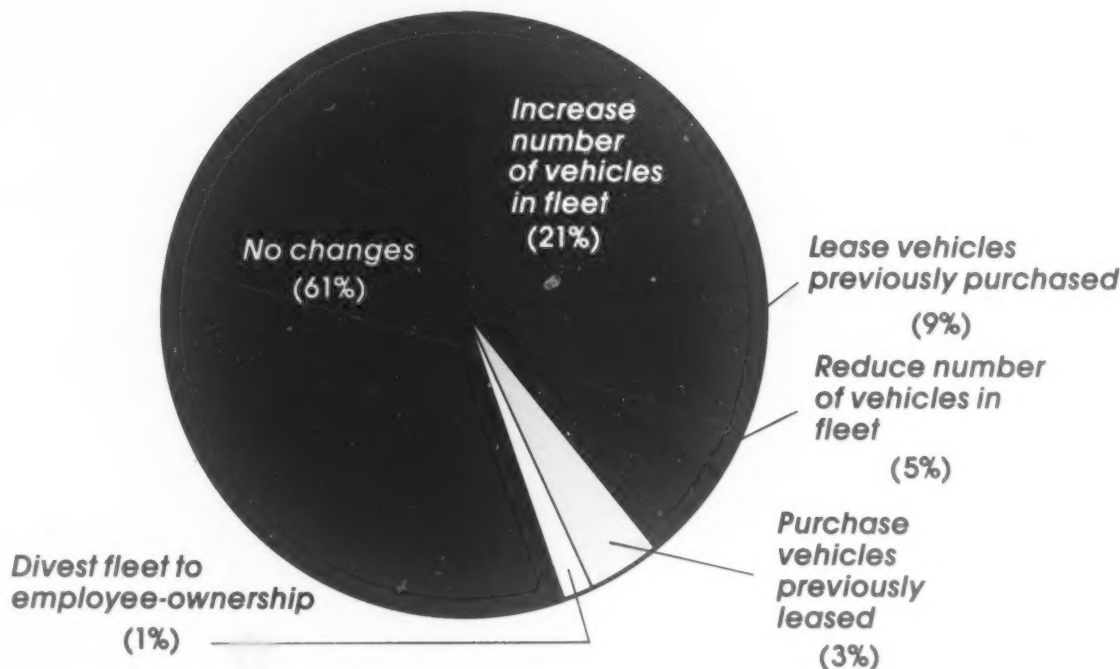
For the fifth consecutive year, a vehicle's initial cost is the most important factor fleet managers take into consideration when choosing vehicles for the fleets, according to survey results.

When asked to rank several factors taken into consideration when ordering new model year vehicles, fleet managers gave "Initial Cost" an average score of 1.722, with a score of "1" being

the highest possible ranking and "7" being the lowest possible ranking. "Economy of Operation" rated an average of 2.884; "Depreciation/Resale Value/Holding Cost" 2.926; and "Serviceability/Ease of Maintenance" 2.971. Next were "Fringe Benefit/Driver Satisfaction" at 4.175; "Company Prestige" 4.954; and "Administrative Ease" 5.362.



Fleets Planning Changes In Size and/or Buying/Leasing Policies



Options By Vehicle Type/Size

If they could, here are the options fleet managers would have on specific size/type vehicles.

Compact	Mid-Size	Light-Duty Truck	Mini-Van
Air Conditioning	Air Conditioning	Air Conditioning	Air Conditioning
All-Season Tires	All-Season Tires	All-Season Tires	All-Season Tires
AM/FM Radio	AM/FM Radio	AM/FM Radio	AM/FM Radio
Automatic Transmission	Automatic Transmission	Automatic Transmission	Automatic Transmission
Dual Side Mirrors	Dual Side Mirrors	Dual Side Mirrors	Dual Side Mirrors
Floor Mats	Floor Mats	Floor Mats	Floor Mats
Fuel Injection	Fuel Injection	Fuel Injection	Fuel Injection
Power Brakes	Power Brakes	Power Brakes	Power Brakes
Power Steering	Power Steering	Power Steering	Power Steering
Pulse Wipers	Pulse Wipers	Pulse Wipers	Pulse Wipers
Rear Defroster	Rear Defroster	Tinted Glass	Rear Defroster
Tinted Glass	Tinted Glass	6-Cylinder Engine	Tinted Glass
4-Cylinder Engine	6-Cylinder Engine	Other*	6-Cylinder Engine
	Cruise Control		Cruise Control
	Tilt Wheel		

* (e.g., 8-cylinder engine; heavy-duty suspension; interior light system; dual edge guards; cloth seats; instrument panel package; diesel engine; and full spare tire.)

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**NAFA'S
ANNUAL
OPERATING
EXPENSE
SURVEY
RESULTS**

**HOW DO
YOUR COSTS
STACK UP?**

**SPOTLIGHT ON
PUBLIC SERVICE FLEETS**

Official Monthly Publication of
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FEATURES

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Find out how much United States fleets are paying each mile for fuel, oil, maintenance and tires in this NAFA Exclusive.
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Because of their vastly different production and management systems, some experts are questioning whether joint ventures will be long-lived.
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In addition to a joint venture, Toyota recently began production at its plant in Kentucky.
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This Public Service Fleet spotlight article highlights the basic points on one of the most important maintenance tools in a garage.
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Learn what the differences are between types of tires and how you can select the best tires for your fleet.
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A joint meeting between the area's Chapters provided the forum for fleet personnel to see and talk about the new model year cars and trucks.
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This California-based fleet's disposal method may not be beneficial to their bottom line, but they're reaping benefits money couldn't buy.
-

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The Big Apple Prepares for NAFA!**
A sneak look into the planning of NAFA's upcoming Annual Conference.
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Learn how one fleet decided it was time to go from gasoline- to diesel-powered engines.
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NAFA's 1988 Fleet Operating Expense Survey Results

- Survey results show United States sales fleets pay an average of 6.39 cents every mile for every automobile each month for fuel, oil, maintenance and tires.
- A control group of ten U.S. fleet managers said their total average cost for fuel, oil, maintenance and tires is 6.32 cents/mile for each automobile.
- Leasing companies sharing their composite operating expenses with NAFA said their average total cost for fuel, oil, maintenance and tires was 6.82 cents/mile for every car.
- Responding government fleets had the highest total operating expense cents/mile average. Following, from highest to lowest averages were: public utility fleets, law enforcement fleets, "other" fleets, service/repair fleets and sales fleets.

United States sales and service/repair, fleets pay an average of 6.56 cents each mile to operate their automobiles, according to results of NAFA's 1988 Operating Expense Survey.

For the first time, NAFA's Operating Expense Survey details separate expenses for automobiles, vans and light-duty trucks. The distinction between these types of vehicles and their relative operating expenses makes for easier, and more logical, comparison between your fleet's statistics and those represented here. Care should be taken, however, when comparing your fleet costs with the data represented here. As is the case with all surveys, the averages shown are representative of only the respondents, so, while they may be accurate, it is difficult to say whether or not they are representative of the entire industry.

Automobile Expenses

Responding sales fleets pay, on average for each automobile, regardless of its size, 4.22 cents/mile for fuel, 0.19 cents/mile for oil, 1.60 cents/mile for maintenance and repairs and 0.38 cents/mile for tires and tire repairs. Since some responding sales fleets gave only total operating expenses rather than separate expenses for each of the above items, the average total operating expense for each automobile is 6.39 cents/mile, according to results. Each automobile in this category is driven an average of 2,204 miles each month.

For sales fleets keeping their automobile figures in a dollars/month/vehicle system, the average automobile expense list, according to survey results, is: fuel, \$95.55/month; oil, \$4.78/month; maintenance and repairs, \$33.78, and tires and tire repairs, \$8.09. Again, since some respondents gave only total dollars/month/vehicle rather than individual expenses for each item, total averagedollars/month/vehicle is \$142.46, according to results. Each automobile in this category is driven an average of 2,135 miles each month.

Van Expenses

Responding sales fleets using both mini- and full-vans in their operations said they pay, on average for each van, 6.09 cents/mile for fuel, 0.42 cents/mile for oil, 2.43 cents/mile for maintenance and repairs and 0.50 cents/mile for tires and tire repairs. Average total van expenses, per vehicle per mile, was 9.11 cents. These vans are driven an average of 2,542 miles every month.

Sales fleets using vans and keeping their figures in dollars/month/vehicle form, say they pay, on average for each van, \$93.57/month for fuel, \$8.74 for oil, \$32.85 for maintenance and repairs and \$11.26 for tires and tire repairs. Total average dollars/month/vehicle in this category was \$157.86. Vehicles in this category are driven an average of 1,970 miles each month, according to results.

Light-Duty Truck Expenses

Sales fleets with light-duty trucks in service said they pay, on average for each truck, 7.61 cents/mile for fuel, 0.23 cents/mile for oil, 2.99 cents/mile for

maintenance and repairs and 0.84 for tires and tire repairs. Total average light-duty truck cents/mile expense averaged 11.31. These trucks average 1,920 miles driven each month.

These fleets keeping light-duty truck expenses in dollars/month/vehicle form, say they pay an average of \$100.17 for fuel, \$6.08 for oil, \$29.88 for maintenance and repairs and \$14.17 for tires and tire repairs. Total average dollars/month/vehicle in this category was \$146.90. Light-duty trucks in this category were driven an average of 2,267 miles every month.

Average Cap Costs

Responding fleets said their average capitalized cost (i.e. original cost) for 1988 model year automobiles was \$10,721; for 1988 vans, \$13,119; and for 1988 light-duty trucks, \$10,467.

Automobiles in responding fleets are depreciated over an average period of 48 months; the most often cited depreciation periods were, however, 50

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Number of Vehicles in Survey

Primary Fleet Use	Company-Owned	Leased	Total
Sales	7,842	27,391	35,233
Service/Repair	13,907	15,468	29,375
Public Utility	26,587	323	26,910
Government	14,463	78	14,541
Law Enforcement	2,554	16	2,570
Other	169	775	944
Total	65,522	44,051	109,573

Types of Vehicles In Responding Fleets

Primary Fleet Use	Sub- Compact	Compact	Mid-Size	Full-Size	Luxury	Total Cars	Mini- Vans	Full- Vans	Total Vans	Light Duty Trucks	Total Vehicles
Sales	1,229	7,034	20,400	740	241	29,644	2,919	2,022	4,941	648	35,233
Service/Repair	91	8,871	11,421	732	137	21,252	1,762	793	2,555	5,568	29,375
Public Utility	5,828	2,436	1,230	177	8	9,679	761	4,590	5,351	11,880	26,910
Government	772	2,999	1,442	2,724	8	7,945	207	1,251	1,458	5,138	14,541
Law Enforcement	2	39	713	1,624	22	2,400	13	51	64	106	2,570
Other	22	31	400	36	21	510	19	327	346	88	944
Total	7,944	21,410	35,606	6,033	437	71,430	5,681	9,034	14,715	23,428	109,573
% of Total	7.3	19.5	32.5	5.5	0.4	65.2	5.2	8.2	13.4	21.4	100.0

Operating Expense Survey

(continued from page 7)

and 60 months. Vans are depreciated over an average period of 53 months, with 50- and 60-month cycles again the most cited. Light-duty trucks are depreciated over an average period of 58 months, with 50 months the most cited cycle. Fleets depreciate all vehicles in the survey an average of two percent every month; this was by far the most often cited depreciation rate.

More than 88 percent of respondents indicated they are self-insured for property damage to their vehicles, while 61 percent said they administer a safety/accident reduction program for their fleets.

Respondent Demographics

For this year's Operating Expense Survey, fleet managers were asked to choose the category which best described their fleet's *primary* function. Forty-five percent of the respondents said their primary fleet function was sales; 20 percent said service/repair; 14 percent said government; 11 percent said public utility; five percent said law enforcement and five percent said "other." No fleet managers said their primary fleet functions were courier/delivery or executive.

The fleets in this survey control 109,573 vehicles, of which 65,522 are company-owned and 44,051

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Automobile Average Cents/Mile Cost Per Vehicle (All Size Vehicles)

Primary Fleet Function	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	2,204	4.22¢	0.19¢	1.60¢	0.38¢	6.39¢
Service/Repair	2,229	4.47	0.25	1.63	0.38	6.72
Public Utility	1,242	3.99	0.77	1.93	0.41	7.89
Government	3,683	4.34	0.32	2.97	0.46	9.94
Law Enforcement	1,864	4.65	0.19	2.27	0.79	7.66
Other	2,269	4.45	0.33	2.47	0.24	7.53

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

Automobile Average Dollar/Month Cost Per Vehicle (All Size Vehicles)

	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	2,135	\$ 95.55	\$4.78	\$33.78	\$ 8.09	\$142.46
Service/Repair	2,025	120.04	7.47	37.84	10.65	176.38
Public Utility	1,048	36.77	3.08	53.44	8.01	94.25
Government	1,038	54.95	6.00	39.14	5.43	117.20
Law Enforcement	1,108	60.14	1.90	90.59	13.00	163.92
Other	2,777	119.01	2.48	25.26	7.19	153.94

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

Operating Expense Survey

(continued from page 8)

are leased. Commercial fleets control 21,918 company-owned vehicles and 43,634 leased vehicles, for a total of 65,552. Public service fleets control 43,604 company-owned vehicles and 417 leased vehicles, for a total of 44,021.

More than 65 percent of the vehicles represented in this survey are automobiles, 21.4 percent are light-duty trucks and 13.4 percent are vans. Of the automobiles, most are mid-size, followed by compacts, full-size, sub-compact and executive. (See chart for actual numbers.) Of the vans, most are full-size, as opposed to mini-vans.

These results reflect only statistics from fleets operating in the United States. Too few responses were received from Canadian fleets to be representative of the industry in that country.

Comparing Expense Lists

As a means of verifying the results of our Operating Expense Survey, NAFA asked several leasing companies to share their composite operating expenses with us. We also devised a "control group" of ten fleet managers, from both the commercial and public fleet sectors, who were known to have accurate, up-to-date operating cost statistics. Following is a detailed comparison of the averages of responding sales fleets, the control group and the leasing companies.

The control group spends an average of 4.22 cents/mile/vehicle (c/m/v) on fuel; fleets in the survey average 4.50 c/m/v; participating leasing companies average 4.64 c/m/v.

For oil, the control group averages 0.22 cents/mile/vehicle, while the survey average is 0.19 c/m/v and leasing companies came in at 0.07 c/m/v.

Vans Average Cents/Mile Cost Per Vehicle (Mini- and Full-Size Vans)

	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	2,542	6.09¢	0.42¢	2.43¢	0.50¢	9.11¢
Service/Repair	2,154	5.71	0.31	2.95	0.71	10.69
Public Utility	1,000	6.05	0.66	4.84	0.98	13.15
Government	1,707	6.60	0.33	4.39	0.53	14.25
Law Enforcement	1,600	4.50	0.50	2.50	0.50	7.50
Other	2,473	6.54	0.75	2.15	0.25	13.41

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

Vans Average Dollar/Month Cost Per Vehicle (Mini- and Full-Size Vans)

	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	1,970	\$ 93.57	\$ 8.74	\$32.85	\$11.26	\$157.86
Service/Repairs	2,583	118.32	14.12	39.00	17.50	173.50
Public Utility	1,101	68.46	6.90	31.72	19.59	144.58
Law Enforcement	NA	NA	NA	NA	NA	NA
Other	NA	NA	NA	NA	NA	NA

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

The control group spends an average of 1.52 cents/mile/vehicle on maintenance and repairs; survey respondents average 1.60 c/m/v; leasing companies average 1.82 c/m/v.

With regard to tires and tire repairs, the control group and the survey respondents both average 0.38 cents/mile/vehicle, while the leasing companies average 0.29 c/m/v.

Total operating expenses for the control group 6.32 cents/mile/vehicle; the survey average is 6.39 c/m/v; the leasing companies average 6.82 c/m/v.

The control group is responsible for 24,064 vehicles, of which 21,655 are company-owned and 2,409 are leased; these vehicles are driven an average of 1,451 miles every month. The survey group controls 7,842 company-owned and 27,391 leased vehicles, for a total of 35,233; these vehicles are driven an average of 2,173 miles each month. The leasing companies did not specify the number of vehicles for which their numbers were based, but each vehicle was driven an average of 2,108 miles each month.

Light-Duty Trucks Average Cents/Mile Cost Per Vehicle

	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	1,920	7.61¢	0.23¢	2.99¢	0.84¢	11.31¢
Service/Repair	1,866	8.44	0.27	4.70	0.96	15.17
Public Utility	1,070	6.85	0.80	5.32	0.95	13.56
Government	1,946	5.69	0.37	5.19	0.85	13.67
Law Enforcement	1,350	6.00	0.30	3.00	0.70	9.93
Other	NA	NA	NA	NA	NA	NA

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

Light-Duty Trucks Average Dollar/Month Cost Per Vehicle

	Average Monthly Mileage	Fuel	Oil	Maintenance and Repairs	Tires and Tire Repairs	Total*
Sales	2,267	\$100.17	\$6.08	\$29.88	\$14.17	\$146.90
Service/Repair	NA	NA	NA	NA	NA	NA
Public Utility	2,130	74.49	4.68	36.33	15.94	\$157.74
Government	2,325	71.81	6.00	43.06	19.81	\$135.44
Law Enforcement	NA	NA	NA	NA	NA	NA
Other	NA	NA	NA	NA	NA	NA

*When individual average costs are added, their total may not equal the total shown due to the fact that some respondents gave only Total Expenses and not expenses for each item.

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NAFA Fleet Executive

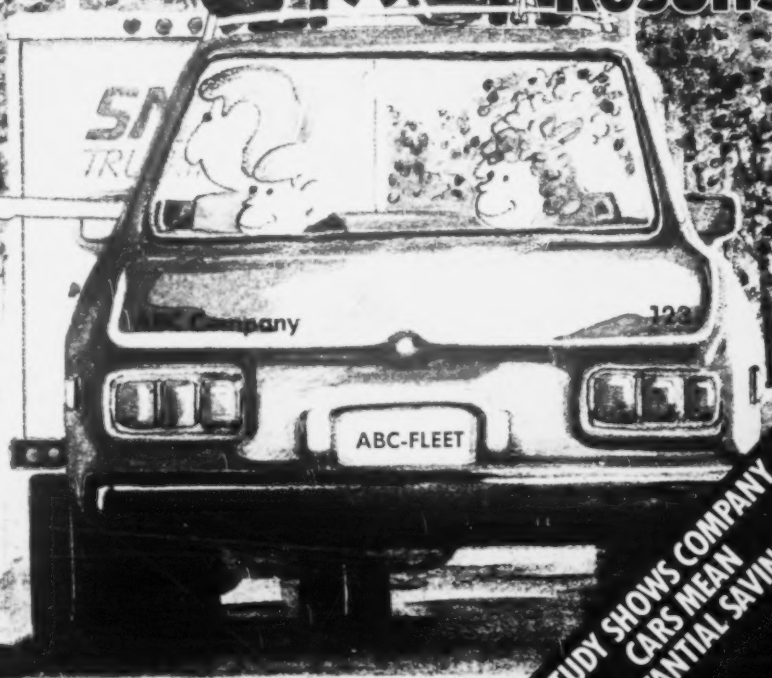
The Magazine for Vehicle Management & c.
May 1989

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Survey
Results



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**For more than 30 years,
the voice of fleet managers
across the United States and Canada.**

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NAFA Fleet Executive

The Magazine for Vehicle Management

May 1989

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4 NAFA's 1989 Personal Use Survey Results

Find out who is allowed to use a company vehicle for personal use, how much, if anything, they are charged for that use, and much more in this NAFA Exclusive.

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Frank Kraus highlighted two year's of accomplishments as he concluded his term as NAFA President during the Association's 32nd Annual Conference.

25 On The Crest of an Evolution: New NAFA President Promises Continued Growth

Paul Hubbard became NAFA's 21st President at the Association's recent Annual Conference and assured Members and Affiliates of even greater support and accomplishments.

30 Company Cars Mean Substantial Savings For Employers and Employees

The NAFA Foundation has released scientific documentation of the cost savings of company-provided vehicles.

34 NAFA Affiliates Host Night of Fifties Fun

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38 Informative Sessions Help NAFA "Preview The 90's"

With nearly three full days of educational courses and workshops, NAFA Members and Affiliates got a sneak preview to the next decade at the recent Annual Conference.

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Following is a brief summary of results of NAFA's 1989 Personal Use Survey. Detailed charts, with industry-by-industry classifications and statistics, follow on the ensuing pages.

AFA's 1989 Personal Use Survey received responses from 610 (527 United States and 83 Canadian) fleet managers. The survey had an increase of 147 responses

(32%) over last year's survey and represents a 29 percent return.

As was the case last year, the "Government" industry classification had the most responses, followed by the "Industrial Manufacturing" industry. The "Drugs and Cosmetics" and "Insurance" categories traded places this year as the classifications with the third and fourth highest numbers of returns.

Fleet managers in this survey control more than half a million (544,599) vehicles, of which 279,987 are leased and 264,562 are company-owned. United States fleets in this survey are comprised of 261,734 leased vehicles and 225,065 company-owned vehicles, for a total of 486,799; Canadian fleets have 18,253 leased vehicles and 39,497 company-owned, for a total of 57,750.

An average U.S. vehicle in this survey is driven 2,826 miles every month, of which 399 miles (14.1%) are considered for personal use. In Canada, a typical vehicle in this survey is driven 5,000* kilometers every month with 616 km (12.3%) considered for personal use.

*Canada's Chemical and Petroleum and Other classifications had unusually

high averages of 16,579 km and 12,451 km, respectively. Without those two averages, Canada's total per vehicle average drops to 2,683 km.

Who Gets A Vehicle?

Nearly half of U.S. respondents claim a company-provided vehicle is assigned to an employee based upon the employee's job title. One out of every four fleet managers says employees are assigned a company vehicle based on the amount of business mileage the employee drives every year. (The average yearly mileage needed to qualify for a company vehicle was 12,411.) The remaining 25 percent of U.S. respondents assign vehicles as either a fringe benefit (13.3%) or base the decision on some "other" factors (11.9%).

As in the U.S., most Canadian fleet managers assign a vehicle first by the employee's job title. However, nearly one-fourth of Canadian fleet managers in this survey also assign vehicles as a part of a fringe benefit package; just over 16 percent assign a vehicle because of the number of kilometers an employee drives every year. (The average yearly kilometer tally to qualify for a company vehicle was 19,843.)

	U.S.	Canada	Total
Drugs and Cosmetics	49	17	66
Chemical & Petroleum	41	10	51
Public Utility	38	0	38
Communications	14	3	17
Food & Beverage	45	9	54
Industrial Manufacturing	66	12	78
Government	82	10	92
Service Organization	39	3	42
Insurance	66	1	67
Consumer Manufacturing	50	8	58
Banking/Financial	19	2	21
Electronics	9	2	11
Other	8	6	14
Total	526	83	609

Who Can Use The Vehicle?

Nearly 90 percent of U.S. fleet managers said their employees can use a company-provided vehicle for personal use. In addition, more than 70 percent said the employee's spouse can use the company vehicle; three out of every ten also said the employee's licensed children can use the company vehicle.

Personal use of company vehicles seems to be even more widespread in Canada: 94 percent of fleet managers in that country said employees can use the vehicle for personal use; 91 percent said employee's spouse can use the vehicle; 73 percent allow employee's children to use the vehicle.

Of the U.S. employees allowed to use a company vehicle for personal use, more than 94 percent have free reign to drive the vehicle whenever necessary. Just more than one percent can only drive the vehicle to and from work. For Canadians, nearly 81 percent of eligible employees can drive a company vehicle whenever necessary. Five percent of Canadians can only

Number and Type of Vehicles in Responding Fleets

United States Fleets

Company-Owned	225,065	
Leased	<u>261,734</u>	
Total		486,799

Canadian Fleets

Company-Owned	39,497	
Leased	<u>18,253</u>	
Total		<u>57,750</u> <u>544,599</u>

Total in Survey

Company-Owned	264,562	
Leased	<u>279,987</u>	
Total		<u>544,599</u>

What is the total mileage a driver puts on an average company vehicle each month?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. (miles)	2,899	2,220	2,323	1,877	1,998	2,201	4,277	2,050	1,823	2,149	1,719	1,838	1,475	2,826
Canada (km)	3,012	16,579	0	1,567	3,152	2,630	2,067	2,500	2,900	2,849	2,550	2,475	12,451	5,000

What is the average personal mileage driven by employees on company vehicles each month?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. (miles)	532	304	528	643	376	359	257	406	391	332	360	799	383	399
Canada (km)	582	645	0	690	517	509	478	800	900	659	1,140	675	749	616

Percent of total monthly mileage considered to be used for personal use.

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total	Overall % U.S. & Canada
U.S. (miles)	18.4%	13.7%	22.7%	34.3%	18.9%	16.3%	6.0%	19.8%	21.5%	15.5%	20.9%	43.5%	25.9%	14.1%	13.2%
Canada (km)	19.3%	3.9%	0	44.0%	16.4%	19.4%	23.1%	32.0%	31.0%	23.1%	44.7%	27.3%	6.0%	12.3%	

Personal Use Survey

(continued from page 5)

drive the vehicle to and from work and another five percent only while working.

Paying For Personal Use

While personal use of company vehicles is allowed in more than 92 percent of all responding fleets, nearly eight out of ten companies charge employees for that privilege. (In the U.S., 78.5% of fleets charge employees for personal use; 64.1% of fleets in Canada do so.)

Thirty percent of U.S. fleets charging employees for personal use do so

on a "cents per mile" basis with the average charge being 16.8 cents/mile. Nineteen percent charge a flat monthly fee averaging \$54; eight percent charge an average of \$17/week; seven percent charge nine cents a mile and either \$10/week or \$45/month.

In Canada, more than 44 percent of fleets charging employees for personal use do so with an average flat monthly fee of \$45 (Canadian). Fifteen percent charge an average of 9.5 cents/kilometer; nearly ten percent charge a weekly fee averaging \$30; nearly six percent charge an average of 8.3 cents/kilometer and \$74/month.

When collecting charges for personal use of company vehicles, U.S. fleets

are evenly divided between use of an expense report (40.7%) or salary deduction (40.5%). Canadian fleet managers show a clear preference: 66 percent use salary deductions; 26 percent use expense reports.

Employee Reimbursements

Eight of ten U.S. fleet managers who have employees with no assigned fleet vehicle reimburse those employees for business use of their personal vehicle on a "per mile" basis. The average amount of reimbursement is 22.5 cents/mile. Less than five percent of these fleet managers use a graduated scale of reimbursement with average fees at 23.2 cents/mile for the first

Factors governing assignment of company-provided vehicle:																	
United States	Drugs & Chem. Cosmet.			Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
Business Mileage Miles per year:	13 12,857	15 11,750	16 10,909	4 10,200	13 15,455	36 13,789	13 9,575	8 15,600	43 10,110	23 13,740	12 15,045	1 0	2 1,000	199 12,411	25.7%	24.3%	
Job title	41	29	25	10	41	54	48	26	43	37	12	7	6	379	49.0%	48.9%	
Fringe Benefit:	11	8	6	2	14	16	8	8	6	14	3	2	5	103	13.3%	14.9%	
Other:	5	17	10	3	5	5	26	8	5	2	1	2	3	92	11.9%	11.9%	
Canada																	
Business Mileage (Kilometers) per year:	2 17,500	4 15,333	0 0	1 0	3 0	1 28,000	3 21,333	1 30,000	0 0	1 0	2 1,000	1 28,800	3 22,500	22 19,843	16.3%		
Job Title	14	8	0	1	7	12	3	3	1	7	2	2	5	65	48.1%		
Fringe Benefit:	9	3	0	1	4	2	1	1	0	4	1	1	5	32	23.7%		
Other	1	2	0	0	2	3	4	1	0	2	0	0	1	16	11.9%		

Who is allowed to use a company vehicle for personal use?																
	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
U.S.																
Employee	49	38	28	10	45	65	42	33	66	50	16	6	8	456	86.7%	87.7%
Employee's spouse	46	22	6	6	39	59	0	20	64	42	8	6	5	323	70.8%	64.5%
Employee's licensed children	24	12	4	4	20	28	0	6	16	19	3	1	3	140	30.7%	32.4%
Others	6	6	6	4	7	3	10	4	4	6	2	1	2	61	13.4%	11.7%
No one, personal use not permitted	0	3	10	4	0	1	40	6	0	0	3	3	0	70	13.3%	12.3%
Canada																
Employee	17	10	0	3	9	12	6	3	1	8	2	2	5	78	94.0%	
Employee's spouse	16	10	0	2	8	12	2	3	1	8	2	1	6	71	91.0%	
Employee's licensed children	14	10	0	2	8	6	1	2	0	7	1	1	5	57	73.1%	
Others	1	3	0	0	2	0	4	0	0	0	0	0	0	10	12.8%	
No one, personal use not permitted	0	0	0	0	0	0	4	0	0	0	0	0	1	5	6.0%	

Personal Use Survey

(continued from page 6)

10,154 miles and 12 cents/mile thereafter. Four percent of U.S. fleet managers reimbursing drivers for business use of a personal vehicle use a flat monthly reimbursement of \$264; just over three percent use a combination of both cents/mile and a flat monthly or weekly fee; less than one percent use only a flat weekly payment.

Similar reimbursement numbers were reported by Canadian fleet managers who have employees *with no assigned fleet vehicle*: Eighty-one percent use a cents/kilometer method

(average payment is 23.9 cents/kilometer); eight percent use a graduated scale of 25.6 cents/kilometer for the first 8,050 kilometers and 20.7 cents/kilometer thereafter; over three percent use a monthly payment averaging \$583; just more than two percent use a combination cents/kilometer and flat monthly payment method; none use a flat weekly payment.

In the U.S., when an employee uses his or her personal vehicle for business use because his or her *assigned fleet vehicle it is not in operation*, fleet managers report they are most likely to reimburse the employee on a "cents/mile" basis. Nearly 85 percent of these

fleet managers said they reimburse drivers an average of 22.4 cents/mile. Just over five percent said they reimburse drivers in this situation at 23.3 cents/mile for the first 8,410 miles and 11.5 cents/mile thereafter. Less than two percent use either a flat weekly or monthly payment or a combination of cents/mile and flat payments.

In Canada, more than 76 percent of fleet managers with drivers using their own vehicles *because their assigned fleet vehicles are not in operation* reimburse drivers an average 24.3 cents/kilometer. Nearly six percent use a graduated scale of 26 cents/kilometer for the first 7,800 kilometers and 21.4

Of the 456 employees who can drive a company vehicle for personal use, under which conditions are they permitted personal use?																
	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
U.S.																
When necessary; at all times	44	30	28	10	40	65	42	33	62	50	16	6	4	430	94.3%	92.3%
Only to and from work	1	2	0	0	1	0	0	0	0	0	0	0	1	5	1.1%	1.7%
Only while working	1	2	0	0	0	0	0	0	0	0	0	0	1	4	0.9%	1.5%
Only weekends & holidays	1	2	0	0	2	0	0	0	1	0	0	0	1	7	1.5%	1.9%
Only while on vacation	1	2	0	0	2	0	0	0	1	0	0	0	1	7	1.5%	1.9%
Other	1	0	0	0	0	0	0	0	2	0	0	0	0	3	0.7%	0.7%
Of the 78 employees who can drive a company vehicle for personal use, under which conditions are they permitted personal use?																
Canada																
When necessary; at all times	13	6	0	3	4	12	6	3	1	8	2	2	3	63	80.8%	
Only to and from work	1	1	0	0	1	0	0	0	0	0	0	0	1	4	5.1%	
Only while working	1	1	0	0	1	0	0	0	0	0	0	0	1	4	5.1%	
Only weekends & holidays	1	1	0	0	1	0	0	0	0	0	0	0	0	3	3.9%	
Only while on vacation	1	1	0	0	1	0	0	0	0	0	0	0	0	3	3.9%	
Other	0	0	0	0	1	0	0	0	0	0	0	0	0	1	1.2%	

Is employee charged for personal use of company vehicle?																
	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
U.S. - Yes	41	28	22	9	36	57	17	23	46	44	15	5	4	358	78.5%	76.5%
U.S. - No	8	10	6	1	9	8	25	10	9	6	1	1	4	98	21.5%	23.5%
Canada - Yes	15	7	0	1	3	6	3	1	1	5	2	2	4	50	64.1%	
Canada - No	2	3	0	2	6	6	3	2	0	3	0	0	1	28	35.9%	

How are employees with no assigned fleet vehicles reimbursed for business use of personally owned vehicles?																
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
Per Mile (Yes)	45	36	33	12	40	59	59	35	60	46	14	6	7	452	82.8%	82.6%
Avg. Amount (cents)	.226	.235	.232	.223	.226	.226	.222	.215	.224	.226	.234	.220	.230	.225		
Weekly Payment (Yes)	0	0	0	1	2	0	0	0	0	0	0	0	0	3	0.6%	0.5%
Avg. Amount (dollars)	\$ 0	0	0	.75	.53	0	0	0	0	0	0	0	0	\$60		
Monthly Payment (Yes)	49	0	2	1	1	1	10	3	0	2	0	1	0	22	4.0%	3.9%
Avg. Amount (dollars)	\$525	0	.65	.300	.435	.350	.258	.267	0	.300	0	.100	0	\$264		
Combination of both cents/mile & weekly or monthly charge: (Yes)	1	1	1	2	0	5	0	3	0	2	0	3	0	18	3.3%	3.2%
Avg. charged per mile	.110	.080	.100	.060	.000	.084	.000	.140	.000	.080	.000	.073	.000	.090		
Avg. Week (dollars)	\$ 0	0	0	0	0	.45	0	.32	0	0	0	0	0	\$41		
Avg. Month (dollars)	\$230	400	110	.291	0	.168	0	.223	.22	.310	0	.313	0	\$241		
Graduated scale: (Yes)	1	4	6	14	2	5	1	0	3	2	2	0	0	27	4.9%	5.4%
1. Amt. for 1st number of miles	.240	.240	.227	.240	.240	.226	.230	.000	.223	.235	.240	.000	.000	.232		
2. Number of miles reimbursed at rate in 1	15,000	7,819	7,455	300	15,000	15,000	15,000	0	5,533	8,125	15,000	0	0	10,154		
3. Amt. for any mileage over that in 2	.110	.125	.137	.115	.110	.110	.110	0	.123	.110	.110	0	0	.120		
Other	1	3	2	1	2	5	5	3	2	0	0	0	0	24	4.4%	4.4%
Canada																
Per Kilometer (Yes)	17	10	0	3	9	10	3	3	1	8	2	1	6	71	81.6%	
Avg. Amount (cents)	.245	.251	0	.230	.239	.235	.243	.247	.160	.231	.235	.210	.238	.239		
Weekly Payment (Yes)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	
Avg. Amount (dollars)	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	\$ 0		
Monthly Payment (Yes)	1	0	0	0	0	0	0	0	0	2	0	0	0	3	3.5%	
Avg. Amount (dollars)	\$550	0	0	0	0	0	0	0	0	.600	0	0	0	\$583		
Combination of both cents/kilometer & weekly or monthly charge: (Yes)	0	0	0	0	0	0	0	0	0	0	0	1	0	2	2.3%	
Avg. charged per km	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.080	.000	.080		
Avg. Week (dollars)	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	\$ 0		
Avg. Month (dollars)	\$ 0	0	0	.300	0	0	0	0	0	0	0	.358	0	\$329		
Graduated scale: (Yes)	0	0	0	0	0	1	5	0	0	0	0	0	1	7	8.0%	
1. Amt. for 1st number of kilometers	.000	.000	.000	.000	.000	.270	.260	.000	.000	.000	.000	.000	.220	.256		
2. Number of kms reimbursed at rate in 1	0	0	0	0	0	5,000	8,800	0	0	0	0	0	7,350	8,050		
3. Amt. for any mileage over that in 2	.000	.000	.000	.000	.000	.210	.212	.000	.000	.000	.000	.000	.180	.207		
Other	1	0	0	1	0	0	1	0	0	0	0	1	0	4	4.6%	

If drivers are charged for personal use of a fleet vehicle how are the charges collected?																
	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
U.S.																
Expense Report	23	11	1	1	17	33	2	9	33	20	5	3	0	158	40.7%	39.0%
Salary Deduction	12	10	15	3	18	25	9	10	29	16	5	2	3	157	40.5%	43.4%
Others	8	6	7	5	4	5	7	6	4	13	7	0	1	73	18.8%	17.6%
Canada																
Expense Report	4	2	0	0	0	0	1	1	1	1	1	1	1	13	26.0%	
Salary Deduction	11	3	0	1	2	5	2	0	0	5	1	0	3	33	66.0%	
Others	0	1	0	0	0	1	0	0	0	1	0	1	0	4	8.0%	

Personal Use Survey

(continued from page 8)

cents/kilometer thereafter.

Several transportation alternatives are available in those instances when an assigned fleet vehicle is not in operation. In the U.S., nearly one-third of fleet managers allow drivers to use their personal vehicle; 32 percent allow them to rent a vehicle; 28 percent allow them to use a pool vehicle. In

Canada, nearly 46 percent of fleet managers opt for a rental vehicle; 28.6 percent allow the driver to use his or her personal vehicle; 21.8 percent allow them to use a pool vehicle.

Accidents & The IRS

U.S. employees allowing spouses or licensed children to drive a company vehicle had better beware: Nearly 60 percent of responding fleets said employees are charged portions of repair costs sustained in accidents when

someone other than the employee is driving the company vehicle. Just over half of Canadian respondents said this is true in their country as well.

Employees seem to get a break, however, if they themselves have an accident with the company vehicle. Only 23.7 percent of U.S. fleet managers and 46.2 percent of Canadian fleet managers say employees are charged portions of repair costs sustained in accidents while the employee was driving the vehicle. Those fleets charging

How are employees charged for personal use of a company vehicle? What amount?															
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bev.	Ind. Mfg.	Govt	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total
Per Mile (Yes)	16	11	7	1	12	21	3	9	22	13	6	2	1	124	30.1%
Avg. Amount (cents)	.181	.185	.206	.060	.124	.160	.217	.159	.186	.135	.178	.165	.190	.168	28.4%
Weekly Charge (Yes)	2	0	3	1	4	7	3	4	4	3	1	1	0	33	8.0%
Avg. Amount (dollars)	\$50	0	11	8	13	21	18	16	12	16	3	3	0	\$17	8.2%
Monthly Charge (Yes)	6	8	1	0	11	9	2	4	17	13	3	2	1	79	19.2%
Avg. Amount (dollars)	\$49	48	35	0	50	77	20	45	48	67	75	33	40	\$54	22.0%
Combination of both cents/mile & weekly or monthly charge: (Yes)	8	0	3	0	2	6	0	1	3	5	1	0	0	29	7.0%
Avg. charged per mile	.075	.000	.127	.000	.130	.038	.000	.060	.077	.072	.240	.000	.000	.091	6.9%
Avg. Week (dollars)	\$ 7	0	10	0	6	10	0	20	0	12	15	0	0	\$10	
Avg. Month (dollars)	\$23	0	80	0	0	67	0	0	38	36	0	0	0	\$45	
Graduated scale: (Yes)	0	0	0	0	0	1	1	0	0	0	0	0	0	2	0.5%
1. Amt. for 1st number of miles	.000	.000	.000	.000	.000	.000	.240	.000	.000	.000	.000	.000	.000	.120	
2. Number of miles reimbursed at rate in 1	0	0	0	0	0	600	15,000	0	0	0	0	0	0	7,800	
3. Amt. for any mileage over that in 2	.000	.000	.000	.000	.000	.090	.110	.000	.000	.000	.000	.000	.000	.100	
Other	14	15	11	8	12	21	10	10	18	18	8	0	1	146	35.4%
Canada															
Per Kilometer (Yes)	3	0	0	0	0	0	1	1	0	1	1	0	1	8	15.4%
Avg. Amount (cents)	.093	.000	.000	.000	.000	.000	.130	.100	.000	.100	.050	.000	.100	.095	
Weekly Charge (Yes)	4	0	0	0	0	1	0	0	0	0	0	0	0	5	9.6%
Avg. Amount (dollars)	\$27	0	0	0	0	40	0	0	0	0	0	0	0	\$30	
Monthly Charge (Yes)	10	2	0	0	2	3	0	0	1	3	1	0	1	23	44.2%
Avg. Amount (dollars)	\$33	21	0	0	38	53	0	0	40	60	112	0	100	\$45	
Combination of both cents/kilometer & weekly or monthly charge: (Yes)	0	0	0	1	0	1	0	0	0	0	0	1	0	3	5.8%
Avg. charged per km	.000	.000	.000	.080	.000	.080	.000	.000	.000	.000	.000	.190	.000	.083	
Avg. Week (dollars)	\$ 0	0	0	0	0	0	0	0	0	0	0	0	0	\$ 0	
Avg. Month (dollars)	* 0	0	0	120	0	50	50	0	0	0	0	75	0	\$74	
Graduated scale: (Yes)	0	0	0	0	0	0	0	0	1	0	0	0	0	1	1.9%
1. Amt. for 1st number of kilometers	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000	
2. Number of kms reimbursed at rate in 1	0	0	0	0	0	0	0	0	1,600	0	0	0	0	1,600	
3. Amt. for any mileage over that in 2	.000	.000	.000	.000	.000	.000	.000	.000	.060	.000	.000	.000	.000	.060	
Other	0	2	0	0	2	0	2	1	0	2	1	1	1	12	23.1%

If an assigned fleet vehicle is not in operation, what alternate means of transportation are authorized?																
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
Employee's personally owned car	40	30	26	13	35	58	34	29	57	41	14	7	5	389	32.9%	32.3%
Rental car	47	34	18	12	37	63	8	29	61	47	11	7	5	379	32.1%	33.8%
District Manager's car	9	5	3	0	5	6	0	5	9	4	3	0	0	49	4.1%	3.8%
Pool car	16	29	36	7	25	31	71	20	50	25	12	3	6	331	28.0%	27.2%
Other:	3	3	1	0	2	3	9	2	5	6	0	0	0	34	2.9%	2.9%
Canada																
Employee's personally owned car	6	5	0	2	5	7	9	3	0	3	2	2	3	47	27.6%	
Rental car	16	10	0	3	9	11	8	2	1	8	2	2	6	78	45.9%	
District Manager's car	0	0	0	0	0	0	1	0	0	0	0	1	0	2	1.2%	
Pool car	4	6	0	1	5	2	8	1	1	2	0	2	5	37	21.8%	
Other:	1	0	0	1	0	1	1	0	0	2	0	0	0	6	3.5%	

How are employees reimbursed for business use of personally owned vehicles when their assigned fleet vehicle is inoperable?																
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total	Overall % U.S. & Canada
Per Mile (Yes)	41	30	28	12	40	55	47	31	58	42	13	8	7	412	84.6%	83.6%
Avg. Amount (cents)	.226	.234	.236	.224	.24	.225	.221	.217	.223	.211	.234	.216	.230	.224		
Weekly Payment (Yes)	0	0	0	1	1	0	0	0	0	2	0	0	0	4	0.9%	0.9%
Avg. Amount (dollars)	\$ 0	0	0	.75	.55	0	0	0	0	.338	0	0	0	\$201		
Monthly Payment (Yes)	0	0	0	0	0	1	0	0	0	0	0	0	0	1	0.2%	0.2%
Avg. Amount (dollars)	\$ 0	0	0	0	0	.230	0	0	0	0	0	0	0	\$230		
Combination of both cents/mile & weekly or monthly charge: (Yes)	0	0	0	0	0	2	0	0	0	0	0	0	0	2	0.4%	0.4%
Avg. charged per mile	.000	.000	.000	.000	.000	.090	.000	.000	.000	.000	.000	.000	.000	.090		
Avg. Week (dollars)	\$ 0	0	0	0	0	.55	0	0	0	0	0	0	0	\$55		
Avg. Month (dollars)	\$ 0	0	0	0	0	.96	0	0	0	0	0	0	0	\$96		
Graduated scale: (Yes)	2	4	4	1	1	5	1	0	1	3	4	0	0	26	5.3%	5.4%
1. Amt. for 1st number of miles	.240	.240	.220	.240	.240	.230	.230	.000	.240	.223	.240	.000	.000	.233		
2. Number of miles reimbursed at rate in 1	7,800	7,819	8,803	225	15,000	12,060	15,000	0	1,000	5,483	10,417	0	0	8,410		
3. Amt. for any mileage over that in 2	.115	.125	.123	.115	.110	.110	.110	.000	.110	.107	.110	.000	.000	.115		
Other	4	3	5	0	1	5	10	3	6	4	0	1	0	42	8.6%	9.5%
Canada																
Per Kilometer (Yes)	9	7	0	3	9	6	5	2	0	4	2	2	6	52	76.4%	
Avg. Amount (cents)	.247	.256	.000	.230	.237	.237	.252	.245	.000	.235	.235	.245	.238	.243		
Weekly Payment (Yes)	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1.5%	
Avg. Amount (dollars)	\$50	0	0	0	0	0	0	0	0	0	0	0	0	\$50		
Monthly Payment (Yes)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	
Combination of both cents/kilometer & weekly or monthly charge: (Yes)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	
Graduated scale: (Yes)	0	0	0	0	0	1	3	0	0	0	0	0	0	4	5.9%	
1. Amt. for 1st number of kilometers	.000	.000	.000	.000	.000	.270	.257	.000	.000	.000	.000	.000	.000	.260		
2. Number of kms reimbursed at rate in 1	0	0	0	0	0	5,000	8,500	0	0	0	0	0	0	7,800		
3. Amt. for any mileage over that in 2	.000	.000	.000	.000	.000	.210	.215	.000	.000	.000	.000	.000	.000	.214		
Other	0	2	0	0	2	2	0	1	0	2	0	0	2	11	16.2%	

Personal Use Survey

(continued from page 10)

the employee for the repair costs are most likely to charge either the insurance deductible amount (average \$224 U.S. and \$197 Canada) or a flat dollar amount (average \$203 U.S. and \$154 Canada).

On that note of being aware and keeping a watchful eye, only ten percent of all respondents reported that the IRS (or equivalent governmental body) had conducted an audit of their personal use records.

A Personal Use History

The statistical data gathered by NAFA over the last three years pro-

vides fleet managers with a detailed history surrounding the complex issue of personal use of company vehicles and business use of personal vehicles.

As seen in the chart on page 18, NAFA's Personal Use Survey has steadily become more accurate and reliable:

- Total respondents increased 31 percent since 1987;
- Total vehicles in surveyed fleets increased 38 percent since 1987;
- Nearly 90 percent of employees have been allowed personal use of company vehicles since 1987;
- Fleets are less likely to allow spouses and licensed children to drive company vehicles for personal

use than they were in 1987;

- In accordance with the above fact, the percent of total monthly fleet mileage considered to be for personal use has dropped by nearly one-third;
- Since 1987, nearly 80 percent of employees using company vehicles for personal use were charged for such use;
- There are two prominent factors determining who gets a company vehicle—job title and yearly business mileage.
- Since 1987, at least 82 percent of employees driving a personal vehicle for business were reimbursed on a cents/mile basis.



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Has the Internal Revenue (or equivalent governmental body) conducted an audit of your company's personal use policies in the past two years?															
	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total
U.S. - Yes	4	1	2	3	6	6	6	4	9	4	3	0	0	48	9.1%
No	45	40	36	11	39	60	76	35	57	46	16	9	8	478	90.9%
Canada - Yes	4	2	0	0	3	0	1	1	1	1	0	0	0	13	15.7%
No	13	8	0	3	6	12	9	2	0	7	2	2	6	70	84.3%

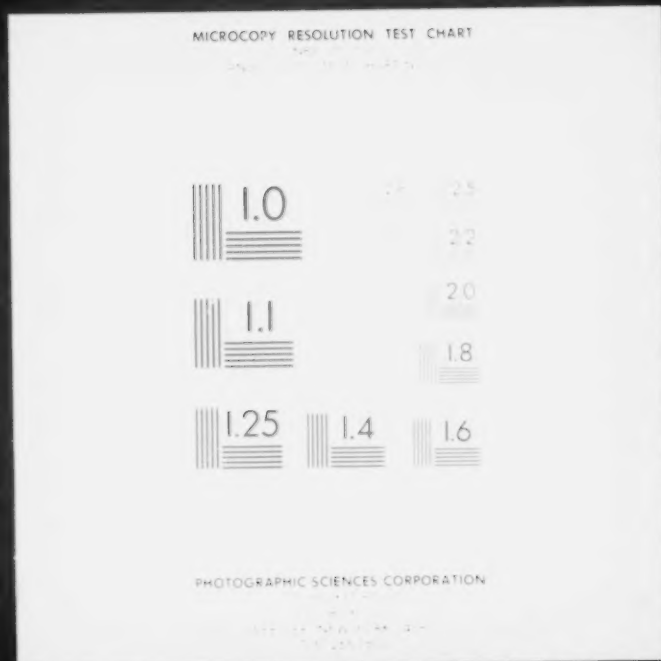
Is any portion of repair costs charged to employee if person other than employee is driving vehicle?															
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total
Yes	22	17	11	6	26	30	17	20	34	22	9	1	3	218	59.4%
No	18	14	10	1	15	22	9	7	21	19	7	3	3	149	40.6%
Canada															
Yes	8	5	0	0	6	1	3	2	0	3	1	1	3	33	52.4%
No	6	3	0	1	3	8	1	0	1	3	1	0	3	30	47.6%

Is any portion of repair costs resulting from accidents during personal use charged to the employee?															
United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/Finance	Elect.	Other	Total	% of Country Total
Yes	11	7	1	3	16	16	4	16	14	12	3	1	2	108	23.7%
No	38	31	27	7	29	49	36	17	52	38	13	5	6	348	76.3%
If "Yes" how much:															
A. Full amount (Yes)	0	2	1	0	1	0	3	1	0	0	2	0	0	10	9.3%
B. Fixed Share (Avg.%) (positive responses)	50.0%	0	0	0	0	0	0	0	0	0	0	50.0%	0	50.0%	1.9%
C. Dollar Amount (Avg.) (positive responses)	\$256	280	0	100	136	217	425	200	117	163	500	0	0	\$203	42.5%
D. Insurance deductible amount (dollars) (positive responses)	\$230	0	0	175	200	238	0	250	175	275	0	0	225	\$224	44.4%
E. Other	1	0	0	0	0	1	0	0	0	0	0	0	0	2	1.9%
Canada															
Yes	8	4	0	2	6	1	3	1	1	3	1	1	5	36	46.2%
No	9	6	0	1	3	11	3	2	0	5	1	1	0	42	53.8%
If "Yes" how much:															
A. Full Amount (Yes)	0	0	0	0	1	0	1	0	0	0	0	0	1	3	8.3%
B. Fixed Share (Avg.%) (positive responses)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
C. Dollar Amount (Avg.) (positive responses)	\$93	175	0	0	233	100	150	25	0	100	0	250	150	\$154	30.6%
D. Insurance deductible amount (dollars) (positive responses)	\$160	250	0	250	75	0	300	0	100	250	250	0	175	\$197	50.0%
E. Other	0	1	0	0	0	1	1	0	0	1	0	0	0	4	11.1%

1987 - 1989 Personal Use Survey Comparison

	1987	1988	1989
o Total fleets responding	464	463	609
o Total vehicles	394,091	518,401	544,599
Company-owned	221,049	283,517	264,562
Leased	173,042	234,884	279,987
o Personal use of company vehicle permitted by:			
Employee	89%	87%	87.7%
Employee spouse	77%	65%	64.5%
Employee's licensed children	44%	34%	32.4%
Others	13%	5%	11.7%
No one; personal use not permitted	11%	13%	12.3%
o Minimum age set for drivers other than employees for use of company vehicle for personal use	38.1%	35.9%	27.7%
o Percent of monthly total fleet mileage considered for personal use	20.1%	20.7%	13.2%
Average personal mileage per driver per month (U.S.)	473	408	399
Average personal mileage per driver per month (Canada)	874km	548km	616km
o Employee charged for personal use of company vehicle:	80%	81.1%	78.5%
o Charging method used for personal use of company vehicle:			
Per mile (kilometer)	45%	32%	28.4%
Weekly/Monthly rate	39%	33.3%	
Weekly rate (1987)			8.2%
Monthly rate (1987)			22.0%
Combination per-mile/weekly/monthly rate	15%	8.1%	6.9%
Graduated scale	NA	1.1%	0.6%
Other	NA	25.5%	33.9%
("Graduated scale" and "Other" options not given in 1987.)			
o Personal Use Charges Collected Via:			
Expense report	68%	37.4%	39.0%
Salary deduction	73%	44.0%	43.4%
Other	NA	18.6%	17.6%
("Other" option not given in 1987.)			
o Factors governing assignment of company vehicle			
Yearly business mileage	31.2%	24.4%	24.3%
Job title	45.2%	13.1%	48.9%
Fringe benefit	14.7%	53.5%	14.9%
Other	8.9%	9.0%	11.9%
o Repair cost paid by driver because of personal use accident			
Full amount	36%	31.8%	26.0%
Fixed share (percentage amount)	5%	10.4%	9.0%
Dollar amount	.7%	2.1%	1.4%
Insurance deductible	35%	45.8%	39.6%
Other	41%	41.7%	45.8%
Other	18.3%	NA	4.2%
Reimbursements			
o Employees reimbursed for business use of personal vehicle - assigned fleet vehicle inoperable			
Per mile rate	96.4%	85.1%	83.6%
Weekly/Monthly rate	.8%	1.4%	
Weekly rate (1987)			0.9%
Monthly rate (1987)			0.2%
Combination of per-mile/weekly/monthly rate	.8%	.7%	0.4%
Graduated scale	2.0%	5.2%	5.4%
Other	NA	6.6%	9.5%
o Employees reimbursed for business use of personal vehicle - no assigned fleet vehicle			
Per mile rate	90.8%	81.3%	82.6%
Weekly/Monthly rate	2.0%	4.8%	
Weekly rate (1987)			0.5%
Monthly rate (1987)			3.9%
Combination of per-mile/weekly/monthly rate	4.7%	3.1%	3.2%
Graduated scale	2.5%	6.3%	5.4%
Other	NA	4.5%	4.4%
IRS (or similar governmental body) audit in last 2 years	8%	7.3%	10.0%

Note: Some questions were re-phrased, making some comparisons unrealistic



24:1

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NAFA Fleet Executive

The Magazine for Vehicle Management
July 1989

NAFA's 1989 Used Vehicle Marketing Survey Results

Months In Service



**For more than 30 years,
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The Magazine for Vehicle Management

July 1989

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6 NAFA's 1989 Used Vehicle Marketing Survey Results

Learn how long fleets are keeping their vehicles in service—and if your replacement cycle is in line with the industry average—how much money fleets recover from the sale of their used vehicles and much more in this annual report.

20 "Gas Prices Will Hold Steady, Interest Rates Will Drop"

Dr. Irwin Kellner, twice ranked as the nation's "Number One Economic Prognosticator," addressed fleet managers with these and other predictions at NAFA's Annual Conference in April.

24 Professionalism: Living On The Edge; Expecting To Win

If you want to be the best at what you do, you have to push yourself to the very edge and expect not to fall over. Those are the real traits of professionalism, according to Dr. Jack Llewellyn, who spoke at NAFA's recent Annual Conference.

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Details on NAFA's upcoming Law Enforcement Group Seminar/Workshop and Police Fleet Information Fair.

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NAFA's 1989 Used Vehicle Marketing Survey Results

NAFA's 1989 Used Vehicle Marketing Survey received 282 responses from United States and Canadian fleet administrators controlling 247,686 vehicles, 97 percent of which were defined as workmobiles, as opposed to perk-mobiles. Of those vehicles, 150,849 were company-owned and 86,365 were leased. These fleets are comprised of 152,260 automobiles (61%), 76,304 light-duty trucks (31%), and 18,622 mini-vans (8%).

The following interpretation is given in five sections: U.S. Automobiles; U.S. Light-Duty Trucks; U.S. Mini-Vans; U.S. Sales Totals and Canadian Fleets. For in-depth, industry-by-industry statistics, see the charts on the following pages.

In a continuation of last year's trend, fleets are driving more miles in less months before turning their vehicles over, according to results of NAFA's 1989 Used Vehicle Marketing Survey.

Last year, fleets began keeping their vehicles shorter periods of time than in the past, but those vehicles had more miles on them than previous years. This year, the same is true, indicating the possibility that there may be fewer fleet vehicles on the roads than in the past, but those vehicles are getting more use.

From 1986 through 1988, for instance, written replacement policies averaged 36 months/60,000 miles, but actual average life service during those years was 32 months/64,540 miles, 31 months/64,350 miles and 30 months/61,000 miles.

One point readers should keep in mind while reviewing the following statistics is the great variation of results

among industry groups. If, therefore, a "total average" seems high, one should compare separate industry numbers to see if perhaps one classification has a higher average than the others.

U.S. Automobiles

The responding 235 U.S. fleets said they sold 34,800 1986-1988 model
(continued on page 8)

Number of Responding Fleets

Industry Classification	U.S.	Canada	
Government/Law Enforcement	53	9	
Insurance	32	2	
Industrial Manufacturing	23	5	
Public Utility	23	2	
Consumer Manufacturing	19	2	
Drugs & Cosmetics	18	13	
Food & Beverage	18	0	
Chemical & Petroleum	16	6	
Banking/Financial	12	0	
Service Organization	9	3	
Communication	7	0	
Electronics	0	2	
Other	5	3	
Totals	235	47	282

Indicate the number of each type of vehicle in your fleet:

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars	14,114 (18)	6,157 (16)	17,780 (23)	808 (7)	9,408 (18)	20,062 (23)	26,115 (51)	3,960 (9)	26,732 (32)	14,435 (19)	2,374 (12)	No Response	523 (5)	142,468 (233)
Light-Duty Trucks	494 (11)	7,436 (14)	41,057 (23)	657 (5)	1,566 (13)	6,027 (18)	8,664 (47)	1,676 (7)	377 (17)	1,249 (8)	212 (11)	No Response	352 (2)	69,767 (176)
Mini-Vans	1,308 (13)	223 (10)	4,812 (19)	955 (4)	606 (11)	3,090 (19)	771 (37)	650 (6)	289 (16)	1,966 (13)	104 (7)	No Response	7 (3)	14,781 (158)
Total	15,916	13,816	63,649	2,420	11,580	29,179	36,050	6,286	27,398	17,650	2,690	No Response	882	227,516
Canada Fleets														
Cars	1,648 (12)	1,374 (6)	610 (2)	No Response	No Response	424 (5)	3,447 (8)	189 (3)	211 (2)	283 (2)	No Response	900 (2)	706 (3)	9,792 (45)
Light-Duty Trucks	6 (4)	1,611 (6)	885 (2)	No Response	No Response	20 (3)	3,931 (9)	80 (2)	No Response	1 (1)	No Response	3 (1)	No Response	6,537 (28)
Mini-Vans	24 (5)	66 (3)	167 (1)	No Response	No Response	224 (3)	338 (7)	1 (1)	No Response	1 (1)	No Response	7 (2)	3,013 (1)	3,841 (24)
Total	1,678	3,051	1,662	No Response	No Response	668	7,716	270	211	285	No Response	910	3,719	20,170

Of the above total vehicles, how many are:

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Workmobile	13,722 (17)	13,230 (16)	61,474 (21)	2,316 (7)	10,949 (17)	20,194 (21)	33,184 (47)	5,836 (8)	16,887 (30)	17,135 (18)	2,348 (12)	No Response	785 (5)	198,060 (219)
Perkmobile	2,191 (10)	115 (7)	1,531 (12)	104 (3)	621 (12)	681 (10)	148 (14)	71 (4)	496 (15)	213 (11)	243 (10)	No Response	97 (4)	6,511 (112)
Total	15,913	13,345	63,005	2,420	11,570	20,875	33,332	5,907	17,383	17,348	2,591	No Response	882	204,571
Canada Fleets														
Workmobile	1,523 (13)	2,917 (6)	1,562 (2)	No Response	No Response	430 (3)	7,545 (9)	259 (3)	165 (2)	249 (2)	No Response	215 (1)	3,631 (3)	18,496 (44)
Perkmobile	155 (12)	134 (2)	100 (1)	No Response	No Response	34 (3)	171 (6)	11 (2)	46 (1)	36 (2)	No Response	40 (1)	88 (3)	815 (33)
Total	1,678	3,051	1,662	No Response	No Response	464	7,716	270	211	285	No Response	255	3,719	19,311

Of the total vehicles in your fleet, indicate how many are:

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Company-Owned	1,101	6,555	54,021	1,146	6,262	10,041	35,772	1,122	16,923	4,937	1,817	No Response	98	139,795
Leased	14,850	6,790	9,628	1,274	5,308	10,027	278	5,164	10,249	12,084	873	No Response	784	77,309
Total	15,951	13,345	63,649	2,420	11,570	20,068	36,050	6,286	27,172	17,021	2,690	No Response	882	217,104
Canada Fleets														
Company-Owned	282	444	594	No Response	No Response	135	7,388	220	60	3	No Response	655	1,273	11,054
Leased	1,396	2,607	1,068	No Response	No Response	533	268	50	151	282	No Response	255	2,446	9,056
Total	1,678	3,051	1,662	No Response	No Response	668	7,656	270	211	285	No Response	910	3,719	20,110

Survey Results

(continued from page 6)

year automobiles last year, the majority of which were model year 1986. Responding U.S. fleets marketed automobiles through sales to employees, auto auctions, wholesalers, used car dealers, new car dealers and other means.

For the second consecutive year that such statistics have been tabulated, auto auctions are the most popular method of disposing of used fleet automobiles in the United States. Nearly twice as many automobiles were marketed through auctions as opposed to selling the vehicles to employees, the second most popular choice.

When these fleets sell automobiles to their employees, one out of four fleets uses *Automotive Market Report* (AMR) to determine selling prices. One out of five uses the *NADA Used Car Guide* and only one of ten uses their own accounting (book) value to set prices.

On the financial end, responding fleets said they recapture anywhere from 35 percent to 40 percent of the original cost of their automobiles when they are marketed.

U.S. Light-Duty Trucks

U.S. fleets responding to this year's survey said they marketed 4,647 1986-1988 model year light-duty trucks last year with nearly 40 percent being 1986 models. The average term in service for these vehicles ranged from 60.2 months/77,124 miles to 36 months/75,000 miles, which is in line with their written replacement cycles which average 60 months and anywhere from 60,000 to 75,370 miles.

Overall, responding U.S. fleets marketed 7,667 light-duty trucks last year through such avenues as employee sales, auto auctions, wholesalers, new car dealers and used car dealers. More than one-third of these trucks were consigned to auto auctions while another one-third were sold through wholesalers or brokers.

Ten out of every 100 light-duty trucks were sold to employees last year. Nearly one out of four fleets

selling these vehicles to employees used *AMR* to establish the selling prices while one in five used the *NADA Used Car Guide*.

These fleets said they recapture from 20 percent to 30.5 percent of the original cost of their light-duty trucks when they are marketed.

U.S. Mini-Vans

Responding U.S. fleets said they marketed 1,401 1986-1988 model year mini-vans last year, with nearly one-half being 1986 models. The average lifecycle for these vehicles ranged from 30 months/60,000 miles to 40.5 months/66,804 miles. These parameters, too, are in line with their written replacement policies which ranged in average from 36 months/60,000 miles to 49 months/66,992 miles.

In total, U.S. fleets in this survey sold 1,876 mini-vans last year, with more than half being marketed through auto auctions and nearly 15 percent sold to employees. In those cases of employee sales, nearly one-third of the fleets use *AMR* to determine the vehicle's selling price while one out of five use the *NADA Used Car Guide*.

These fleets say they recapture anywhere from 33 percent to 40 percent of the original cost the mini-vans when they are marketed.

U.S. Sales Totals

U.S. fleets represented in this survey marketed 40,848 1986-1988 model year vehicles last year: 17,247 were 1986 models; 14,451 were 1987 models and 9,150 were 1988 models.

Overall, these fleets sold 14,706 to auto auctions; 6,820 to employees; 6,176 to wholesalers/brokers; 1,232 to new car dealers; 1,105 to used car dealers; and 10,309 via "other" methods. These fleets salvaged 500 vehicles.

Twenty-six percent of respondents selling vehicles to employees use *Automotive Market Report* to determine the vehicles' prices. Also, 20 percent use the *NADA Used Car Guide*, nine percent use their leasing companies' estimated market value and seven percent use their accounting (book value) to determine employee purchase

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The Toyota Fleet Perspective

The most important goal to Toyota is complete customer satisfaction. It's our ongoing commitment to satisfy you every step of the way. With over 1,000 Toyota Dealers nationwide, we are readily available to meet your parts, service and overall fleet needs. But it doesn't end there. With Toyota's 36-mo./36,000-mile basic new vehicle limited warranty, your fleet's covered all the way from roof liner to lug nuts.* No deductible, no transfer fee, and a 5-yr./unlimited-mileage warranty on corrosion/perforation. For more personalized information, contact the Toyota Regional Fleet Manager nearest you.

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NADA Fleet Department

Survey Results

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prices. In 80 percent of these cases, it is the fleet managers themselves who determine which of the pricing guidelines will be used; leasing companies decide in four percent of the cases.

For those fleets measuring the success of their marketing efforts, 27 percent use AMR sales figures as their guideline to determine how well they are doing. Twenty-one percent compare their sale prices with the going market value of the vehicles and 20 percent compare figures with previously established internal standards. Thirteen percent of responding fleets do not measure the success of the marketing efforts.

With the previous statistics, it is interesting to note that only 48 percent

of fleets marketing vehicles through auctions or wholesalers consign vehicles to a facility where it may obtain maximum resale value. In other words, 52 percent of these fleets will market their vehicles at a facility close to a driver's location rather than moving the vehicles to a more profitable site that may be some distance away.

Reconditioning, Title Transfers And More

Nearly 33 percent of all U.S. fleets in this survey never recondition their vehicles before they are sold and another 35 percent "rarely" recondition their vehicles, according to results. One out of five fleets "sometimes" recondition vehicles, while only seven percent do so "often" and six percent "always" do so.

For the combined nearly 68 percent

of U.S. fleets that recondition their vehicles to any degree, seven out of ten spend less than an average of \$300 per vehicle on reconditioning. Just more than 22 percent of these fleets have an average per vehicle reconditioning expense between \$301 and \$500; seven percent spend between \$501 and \$700; and one percent spend more than \$700 reconditioning each vehicle.

If a U.S. driver's employment is terminated, nine times out of ten his or her "extra" vehicle will be reassigned to another employee, rather than sold.

When U.S. fleet vehicles are sold, the fleet manager or fleet staff handles title transfers in 46 percent of the cases represented in this survey. Leasing companies handle title transfers in 40 percent of the cases, while

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Indicate your actual, written replacement policies for each type of vehicle:

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars:														
Mean Months	36	35	70	36	34	37	62	41	37	36	32	No Response	37	44
Mean Miles	55,294	73,214	75,357	64,000	61,000	58,283	73,837	72,857	54,897	61,053	53,182		62,000	64,028
Med. Months	36	36	72	36	36	36	60	36	36	36	30		36	36
Med. Miles	55,000	67,500	77,500	60,000	60,000	60,000	70,000	75,000	50,000	60,000	55,000		60,000	60,000
Mode Months	36	36	72	24	36	36	60	24	36	36	24		36	36
Mode Miles	55,000	60,000	80,000	60,000	60,000	60,000	60,000	75,000	50,000	60,000	50,000		60,000	60,000
Light-Duty:														
Mean Months	43	47	78	40	40	46	77	45	52	47	39	No Response	48	60
Mean Miles	71,250	84,231	73,572	60,000	77,222	80,714	78,146	75,000	60,667	73,125	70,000		60,000	75,370
Med. Months	36	42	84	36	36	45	72	42	48	39	36		48	60
Med. Miles	65,000	75,000	80,000	60,000	65,000	77,500	75,000	72,500	62,500	68,750	60,000		60,000	75,000
Mode Months	36	36	60	24	36	36	60	24	36	24	36		48	60
Mode Miles	55,000	78,500	80,000	60,000	60,000	100,000	75,000	55,000	70,000	55,000	60,000		60,000	60,000
Mini-vans:														
Mean Months	37	30	71	30	36	36	70	41	57	36	37	No Response	33	49
Mean Miles	57,083	67,857	78,182	60,000	62,556	61,059	74,833	77,000	56,750	62,273	66,250		65,000	66,992
Med. Months	36	30	60	30	36	36	60	36	48	36	37		33	38
Med. Miles	55,000	70,000	80,000	60,000	60,000	60,000	73,500	75,000	50,000	60,000	57,500		65,000	65,000
Mode Months	36	24	60	24	36	36	60	12	36	36	36		30	36
Mode Miles	55,000	60,000	80,000	60,000	60,000	60,000	75,000	55,000	50,000	55,000	50,000		60,000	60,000

Canada Fleets														
Cars:														
Mean Months	34	40	48	No Response	No Response	34	58	48	36	36	No Response	24	41	39
Mean km	88,636	94,333	90,000			96,000	122,143	78,500	90,000	85,000		90,000	83,333	95,325
Med. Months	36	36	48			36	60	48	36	36		24	40	36
Med. km	90,000	98,000	90,000			100,000	130,000	78,500	90,000	85,000		90,000	80,000	90,000
Mode Months	36	36	36			24	72	48	36	36		12	36	36
Mode km	90,000	100,000	90,000			80,000	130,000	77,000	90,000	80,000		90,000	60,000	90,000
Light-Duty:														
Mean Months	54	36	51	No Response	No Response	40	67	N/A	No Response	No Response	No Response	48	40	51
Mean km	95,000	92,000	90,000			113,333	127,222	250,000				96,000	75,000	115,043
Med. Months	54	36	51			48	72	N/A				48	40	48
Med. km	95,000	90,000	90,000			100,000	130,000	250,000				96,000	75,000	100,000
Mode Months	48	36	42			48	60	N/A				48	40	36
Mode km	95,000	90,000	90,000			80,000	130,000	250,000				96,000	75,000	90,000
Mini-vans:														
Mean Months	48	40	51	No Response	No Response	36	62	3	No Response	36	No Response	42	40	46
Mean km	92,500	38,000	90,000			106,667	127,500	80,000		90,000		93,000	75,000	140,458
Med. Months	48	36	51			36	60	3		36		42	40	45
Med. km	92,500	90,000	90,000			100,000	130,000	80,000		90,000		93,000	75,000	95,000
Mode Months	36	36	42			24	60	3		36		36	40	36
Mode km	90,000	90,000	90,000			80,000	130,000	80,000		90,000		90,000	75,000	90,000

Indicate how many of each specific type of vehicle you marketed through each method.

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars:														
To employees	898	417	242	35	489	1,127	8	307	761	1,246	324	No Response	10	5,864
Auto Auction	1,812	329	1,272	42	1,208	339	1,094	106	1,039	3,400	96		19	10,756
Wholesalers/Brokers	349	365	340	30	375	610	476	0	202	637	129		2	3,515
Used Car Dealer	0	0	137	7	20	305	0	0	95	1	67		0	652
Trade-In to New Car Dealers	0	0	12	0	524	63	5	0	559	0	6		2	1,189
Salvaged	103	10	11	0	30	30	11	39	26	84	13		0	357
Other	301	99	227	0	21	1	1,847	114	148	56	0		6	2,820
Light-Duty:														
To employees	4	282	134	0	43	148	0	31	1	11	14	No Response	15	683
Auto Auction	8	138	2,312	9	22	125	18	45	35	21	10		50	2,950
Wholesalers/Brokers	4	95	1,372	6	222	223	386	0	0	94	100		10	2,512
Used Car Dealer	3	4	333	2	0	0	0	0	0	9	5		0	356
Trade-In to New Car Dealers	0	1	25	0	7	1	1	0	0	0	2		0	37
Salvaged	0	17	21	5	8	7	4	21	0	36	0		0	119
Other	0	263	529	0	0	1	192	24	1	0	0		0	1,010
Mini-vans:														
To employees	92	13	7	0	8	78	4	35	1	35	0	No Response	No Response	273
Auto Auction	171	17	577	1	3	76	3	39	0	110	3			1,000
Wholesalers/Brokers	23	8	29	0	11	46	6	0	0	25	1			149
Used Car Dealer	1	0	29	0	0	61	0	0	0	0	6			97
Trade-In to New Car Dealers	0	0	0	0	6	0	0	0	0	0	0			6
Salvaged	3	0	6	0	2	9	0	2	0	2	0			24
Other	4	0	317	0	0	0	0	4	0	2	0			327
Total	3,775	2,058	7,932	137	2,969	3,250	4,055	767	2,868	5,769	776	No Response	114	34,696

Canada

Canada Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars:														
To employees	139	190	0	No Response	No Response	67	8	42	12	15	No Response	295	9	777
Auto Auction	175	155	84			4	138	0	15	44		20	251	886
Wholesalers/Brokers	179	227	0			33	40	10	0	8		5	24	526
Used Car Dealer	10	0	0			16	0	0	0	0		0	9	35
Trade-In to New Car Dealers	0	0	0			0	2	0	5	0		0	0	7
Salvaged	2	2	0			0	6	0	0	0		0	0	10
Other	0	9	0			18	96	1	42	0		365	0	531
Light-Duty:														
To employees	0	140	0	No Response	No Response	0	3	1	No Response	No Response	No Response	No Response	0	144
Auto Auction	0	150	335			0	200	0					792	1,477
Wholesalers/Brokers	0	59	0			7	275	0					0	341
Used Car Dealer	0	0	0			4	0	0					0	4
Trade-In to New Car Dealers	2	0	0			0	0	0					0	2
Salvaged	0	0	0			0	1	0					0	1
Other	0	57	0			0	5	6					0	68
Mini-vans:														
To employees	2	No Response	No Response	No Response	No Response	16	0	No Response	No Response	No Response	No Response	No Response	No Response	18
Auto Auction	0					0	1							1
Wholesalers/Brokers	0					22	0							0
Used Car Dealer	0					0	0							0
Trade-In to New Car Dealers	0					0	0							0
Salvaged	0					0	0							0
Other	0					0	0							0
Total	509	989	419	No Response	No Response	187	775	60	74	67	No Response	685	1,085	4,850

A Canadian Perspective On Used Vehicle Marketing

The 47 Canadian fleets responding to NAF's 1989 Used Vehicle Marketing Survey said they sold 2,144 1986-1988 model year automobiles, 422 1986-1988 model year light-duty trucks and 43 1986-1988 model year mini-vans last year. Of those 2,609 vehicles, 1,215 were model year 1986, 694 were model year 1987 and 700 were model year 1988.

Overall last year, these fleets sold

Survey Results

(continued from page 10)

fleet service vendors do so two percent of the times. "Others" handle title transfers 12 percent of the times.

Fifteen percent of United States fleets sell the majority of their vehicles during May, according to survey results. This was followed closely by October and April, with 14 percent and 13 percent of fleets saying those are their busiest sales months, respectively. The remainder of the calendar, in terms of busiest sales months, is: November, March, June, February, September, July and December (tied) and January and August (tied).

Nearly half of the responding U.S. fleets said they have no plans to change any facets of their operations in order to positively affect their used vehicle marketing efforts.

For those fleets planning a change in their vehicle marketing, 28 percent said they will use another make or model of vehicle in their fleets in order to enhance their resale market. Another 23 percent said they will change their replacement cycles: Three in ten will keep vehicles in service more months and miles; three in ten will keep vehicles in service fewer months and miles; and four in ten will do something "other" than those options. Another 18 percent said they will change the type of engine in their vehicles; 14 percent said they will change the optional equipment in the vehicles and nine percent said they will use a different method of resale. 

4,850 vehicles, nearly half of which were marketed through auto auctions. Twenty percent of these vehicles were sold to employees, 18 percent were sold to wholesalers or brokers and 13 percent to either new car dealers, used car dealers or "others".

Black Book Is Best

For those fleets selling their vehicles to employees, more than one-third use the *Canadian Black Book* to determine selling prices. Sixteen percent use their leasing companies' esti-

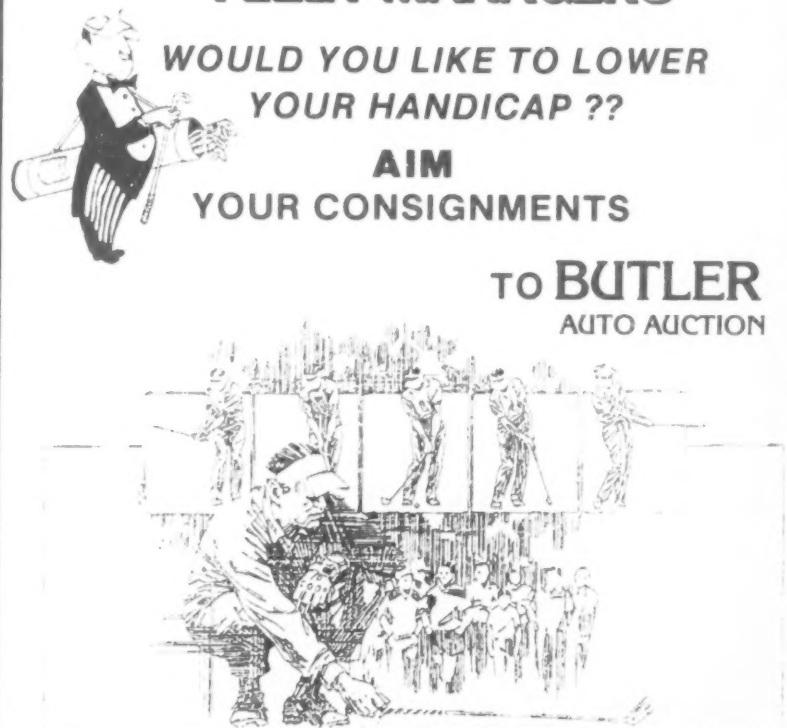
(continued on page 17)

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Canadian Perspective

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estimated market value to determine prices; 15 percent use their accounting (book) value and 13 percent use an auto auction report. The remaining

fleets use the fleet managers' estimated market value, *Red Book* used car valuation or "other" methods. In eight of ten cases, fleet managers determine which of the previous pricing methods will be used when selling vehicles to employees.

When these fleets sell their vehicles through auctions or wholesalers, 52 percent will do so at a facility close to the driver's location. Seen the other way, 48 percent will move the vehicle to a facility that may prove to be more

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Indicate the average number of months and miles for each type of vehicle sold in 1985.

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars														
Months in Service:														
Mean	26.7	33.6	73.3	36.0	28.4	27.4	51.7	39.8	28.9	25.9	30.4	No Response	37.6	39.2
Median	27.0	29.0	72.5	36.0	30.0	27.0	50.0	28.5	29.0	25.5	28.0		36.0	32.0
Mode	27.0	24.0	48.0	24.0	30.0	24.0	6.0	24.0	24.0	24.0	24.0		36.0	24.0
Miles in Service:														
Mean	53,786	67,195	73,175	73,000	55,775	59,775	75,122	65,857	55,071	56,248	52,080		62,000	63,163
Median	54,250	60,000	75,000	60,000	60,000	59,500	75,000	75,000	54,575	56,000	50,000		62,500	60,000
Mode	55,000	60,000	75,000	59,000	70,000	50,000	55,000	75,000	50,000	48,000	50,000		50,000	60,000
Light-Duty														
Months in Service:														
Mean	39.4	42.2	82.1	76.5	38.5	42.2	71.4	70.4	59.2	49.7	35.7	No Response	46.0	60.2
Median	36.0	36.0	84.5	76.5	32.0	36.0	66.0	54.0	50.0	42.0	35.5		46.0	51.5
Mode	30.0	36.0	96.0	60.0	32.0	30.0	48.0	24.0	50.0	27.0	24.0		44.0	36.0
Miles in Service:														
Mean	62,200	84,701	80,170	123,333	70,275	73,945	76,907	82,285	57,750	79,130	65,622		107,500	77,124
Median	62,000	86,000	85,000	150,000	60,000	84,503	80,000	95,000	56,000	79,761	65,000		107,500	75,440
Mode	50,000	59,000	40,000	45,000	60,000	95,000	70,000	50,000	40,000	100,000	75,000		65,000	75,000
Mini-vans														
Months in Service:														
Mean	25.8	26.4	58.0	No Response	23.0	23.7	70.7	50.4	33.0	30.8	34.0	No Response	30.0	40.5
Median	28.5	24.0	60.0		26.0	24.0	60.0	30.0	33.0	31.0	36.0		30.0	30.0
Mode	16.0	24.0	27.0		10.0	18.0	48.0	12.0	22.0	33.0	36.0		30.0	30.0
Miles in Service:														
Mean	58,267	80,697	84,568		53,876	59,556	72,679	70,000	49,000	59,090	66,166		0	66,804
Median	57,650	62,500	69,000		60,000	58,544	73,000	75,000	49,000	58,261	70,000		0	62,000
Mode	48,000	60,000	49,938		22,882	50,000	75,000	75,000	49,000	56,341	70,000		0	60,000

Canada

Canada Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars														
Months in Service:														
Mean	27.4	26.4	48.0	No Response	No Response	36.6	55.4	35.5	30.0	33.5	No Response	18.0	35.3	34.2
Median	27.0	26.0	48.0			36.0	48.0	36.0	30.0	33.5		18.0	36.0	30.0
Mode	24.0	20.0	36.0			36.0	36.0	22.0	24.0	29.0		12.0	25.0	24.0
Kilometers in Service:														
Mean	90,363	91,625	100,000			98,915	130,000	105,667	91,000	87,500		33,000	101,350	97,830
Median	90,000	90,000	100,000			100,000	130,000	110,000	91,000	87,500		33,000	101,350	92,000
Mode	90,000	80,000	100,000			60,000	130,000	77,000	90,000	85,000		33,000	87,000	90,000
Light-Duty														
Months in Service:														
Mean	60.0	34.5	50.0	No Response	No Response	48.5	66.8	47.5	No Response	No Response	No Response	No Response	46.0	55.0
Median	60.0	34.5	50.0			48.5	72.0	47.5					46.0	48.0
Mode	60.0	30.0	40.0			48.0	48.0	47.0					46.0	48.0
Kilometers in Service:														
Mean	59,000	97,468	100,000			131,275	140,833	210,000					102,000	132,232
Median	59,000	97,468	100,000			131,275	142,500	210,000					102,000	120,000
Mode	59,000	90,000	100,000			125,000	90,000	120,000					102,000	90,000
Mini-vans														
Months in Service:														
Mean	No Response	No Response	50.0	No Response	No Response	50.0	48.0	No Response	No Response	No Response	No Response	No Response	46.0	48.7
Median			50.0			50.0	48.0						46.0	48.0
Mode			40.0			50.0	48.0						46.0	48.0
Kilometers in Service:														
Mean			100,000			159,865	200,000						102,000	140,466
Median			100,000			159,865	200,000						102,000	130,933
Mode			100,000			159,865	200,000						102,000	100,000

Canadian Perspective

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profitable even if it is a further distance away from the driver.

Automobiles sold by these fleets last year had average lifecycles ranging from 24 months/90,000 kilometers, to 34.2 months/97,830 km. Light-duty trucks had average lifespans from

48 months/90,000 km, to 55 months/132,232 km. Mini-vans averaged from 48 months/100,000 km to 48 months/140,466 km.

To compare the above statistics, average written replacement policies for Canadian automobiles ranged from 36 months/90,000 km, to 39 months/95,325 km. Written policies for light-duty trucks ranged between 36 months/

90,000 km, to 51 months/115,043 km. Written policies for mini-vans ranged from 36 months/90,000 km, to 46 months/140,458 km.

Returns On Investments

On the financial end of marketing, responding Canadian fleets claim they recapture a range of 20 percent to 35.5 percent of the original price of each automobile when it is marketed. For light-duty trucks, they recapture from 10 percent to 28.4 percent; for mini-vans, from 21.9 percent to 25 percent.

To determine how well they did when marketing their vehicles, 40 percent these fleets compare their results with the market value of the vehicles. Twenty percent of these fleets compare their results with their actual lease or purchase price, another 20 percent compare with previously established internal standards and nine percent compare their results with other, similar-sized and equipped fleets. Twenty-three percent of Canadian respondents do not measure their resale efforts in any way.

Selling "As Is"

Thirty percent of responding Canadian fleets do not recondition their vehicles in any manner before selling them, while another 45 percent said they rarely recondition vehicles. Ten percent of these fleets "sometimes" recondition their vehicles, eight percent "often" do so, and seven percent "always" do so.

For the combined 70 percent of Canadian fleets that to some degree recondition their vehicles, more than half spend less than \$300. Three in ten of these fleets spend between \$301-\$500 and less than two of every ten spend more than \$500.

When a Canadian driver's employment is terminated, eight times out of ten the fleet will reassign that "extra" vehicle to another employee, rather than sell it.

Leasing companies handle 62 percent of title transfers for responding Canadian fleets when their vehicles are sold. Fleet managers handle these responsibilities 21 percent of the times, "others" do so 15 percent of the times and fleet service vendors do so

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Indicate the methods used to determine prices for each type of vehicle sold to employees in 1988

US Fleets	Cars	Light-Duty Trucks	Mini-Vans	Total
Accounting (Book)Value	26	11	7	44
Auction Report	18	10	8	36
Automotive Mkt. Report	83	40	35	158
Black Book's Finance & Lease Guide	4	3	1	8
Black Book Weekly	19	11	6	36
Fleet Mgrs. Est. Mkt. Value	21	13	7	41
Galve's Auto Price List	6	2	3	11
Kelley Blue Book	17	9	4	30
Leasing Co. Est. Mkt. Value	27	16	12	55
NADA Used Car Guide	61	37	24	122
Red Book Used Car Valuation	10	2	3	15
Other	21	16	7	44

Canada

US Fleets	Cars	Light-Duty Trucks	Mini-Vans	Total
Accounting (Book)Value	9	4	1	14
Auction Report	7	3	2	12
Canadian Black Book	21	8	3	32
Fleet Mgrs. Est. Mkt. Value	4	3	2	9
Kelley Blue Book	0	0	0	0
Leasing Co. Est. Mkt. Value	10	4	1	15
Red Book Used Car Valuation	2	3	2	7
Other	3		1	4

Canadian Perspective

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two percent of the times.

Responding Canadian fleets are most active selling their vehicles during May. The remainder of the calendar, in order of number of vehicles sold, is: February and March (tied);

April, June, September and October (tied); November and December (tied); August; and January and July (tied).

No Changes Planned

More than half of these fleets said they plan no changes in their operations to positively affect their resale

efforts. For those planning changes, 29 percent said they will change the engine type in their vehicles; 23 percent will change the make or model of vehicles in service; 17 percent will change their method of resale; 17 percent will change their replacement cycles; and 14 percent will change the optional equipment in their vehicles.

Indicate the percent of the original price (or cap cost) for each type of vehicle that was recaptured from its sale.

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars:														
Mean	48.0%	39.9%	13.7%	25.6%	39.3%	41.1%	27.1%	40.8%	47.0%	47.3%	47.2%	No Response	26.7%	36.5%
Median	42.5%	40.0%	13.0%	25.0%	40.0%	42.0%	25.0%	35.0%	50.0%	45.0%	44.5%	No Response	32.0%	35.0%
Mode	38.0%	29.0%	10.0%	13.0%	30.0%	30.0%	20.0%	30.0%	50.0%	45.0%	40.0%	No Response	15.0%	40.0%
Light-Duty:														
Mean	42.3%	30.2%	17.1%	18.0%	33.1%	43.8%	31.1%	28.0%	35.3%	29.0%	43.6%	No Response	13.0%	30.5%
Median	30.0%	31.0%	16.0%	16.0%	31.0%	40.0%	27.0%	24.0%	21.0%	28.5%	34.5%	No Response	13.0%	25.0%
Mode	18.0%	40.0%	10.0%	5.0%	19.0%	10.0%	20.0%	15.0%	20.0%	10.0%	31.0%	No Response	13.0%	20.0%
Mini-vans:														
Mean	45.8%	38.0%	15.8%	22.5%	38.8%	41.0%	27.2%	53.3%	60.5%	48.2%	56.8%	No Response	No Response	34.8%
Median	45.0%	40.0%	15.0%	22.5%	42.0%	50.0%	27.0%	45.0%	60.5%	49.5%	52.5%	No Response	No Response	33.0%
Mode	18.0%	40.0%	10.0%	10.0%	16.0%	50.0%	25.0%	30.0%	47.0%	32.0%	25.0%	No Response	No Response	40.0%
Canada Fleets														
Cars:														
Mean	46.6%	39.4%	20.0%	No Response	No Response	24.3%	25.8%	20.0%	38.5%	47.0%	No Response	80.0%	24.0%	35.5%
Median	50.5%	44.0%	20.0%	No Response	No Response	25.0%	24.0%	20.0%	38.5%	47.0%	No Response	80.0%	24.0%	35.0%
Mode	51.0%	20.0%	15.0%	No Response	No Response	13.0%	5.0%	20.0%	35.0%	47.0%	No Response	80.0%	5.0%	20.0%
Light-Duty:														
Mean	48.0%	48.7%	19.0%	No Response	No Response	22.5%	25.6%	20.0%	No Response	No Response	No Response	No Response	10.0%	28.4%
Median	48.0%	46.0%	19.0%	No Response	No Response	22.5%	23.0%	20.0%	No Response	No Response	No Response	No Response	10.0%	24.5%
Mode	48.0%	40.0%	15.0%	No Response	No Response	18.0%	32.0%	20.0%	No Response	No Response	No Response	No Response	10.0%	10.0%
Mini-vans:														
Mean	No Response	No Response	20.0%	No Response	No Response	21.5%	23.3%	No Response	No Response	No Response	No Response	No Response	No Response	21.9%
Median	No Response	No Response	20.0%	No Response	No Response	21.5%	22.0%	No Response	No Response	No Response	No Response	No Response	No Response	22.0%
Mode	No Response	No Response	15.0%	No Response	No Response	18.0%	12.0%	No Response	No Response	No Response	No Response	No Response	No Response	25.0%

Indicate how many of each specific type of vehicle for each model year you sold in 1988:

US Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manuf.	Gov. & Law Enfor.	Service Org.	Insurance	Consum. Manuf.	Banking/Financial	Elect.	Other	Total
Cars:														
Model 1986	2,622	1,344	260	33	1,980	1,577	2,240	228	2,071	1,922	477	No Response	6	14,760
Model 1987	1,793	1,154	186	17	1,425	1,465	1,847	224	1,497	2,753	75	No Response	3	12,439
Model 1988	1,129	1,012	139	15	1,267	1,105	1,929	104	249	651	1	No Response	0	7,601
Light-Duty:														
Model 1986	7	889	230	3	204	24	315	41	15	44	37	No Response	No Response	1,809
Model 1987	4	718	167	0	20	250	273	29	13	26	5	No Response	No Response	1,505
Model 1988	8	533	142	0	15	219	256	15	0	145	0	No Response	No Response	1,333
Mini-vans:														
Model 1986	237	9	79	1	13	166	20	60	25	53	15	No Response	No Response	678
Model 1987	91	29	95	0	7	158	24	22	6	72	3	No Response	No Response	507
Model 1988	14	27	37	0	15	48	17	0	0	58	0	No Response	No Response	216
Total	5,905	5,715	1,335	69	4,946	5,012	6,921	723	3,876	5,724	613	No Response	9	40,848
Canada Fleets														
Cars:														
Model 1986	261	310	0	No Response	No Response	84	29	32	74	35	No Response	40	27	898
Model 1987	231	186	20	No Response	No Response	70	5	2	0	32	No Response	25	12	583
Model 1988	21	2	0	No Response	No Response	35	0	20	0	0	No Response	580	5	663
Light-Duty:														
Model 1986	No Response	204	No Response	No Response	No Response	12	53	7	No Response	No Response	No Response	No Response	No Response	276
Model 1987	No Response	83	No Response	No Response	No Response	8	17	1	No Response	No Response	No Response	No Response	No Response	109
Model 1988	No Response	27	No Response	No Response	No Response	4	2	4	No Response	No Response	No Response	No Response	No Response	37
Mini-vans:														
Model 1986	3	No Response	No Response	No Response	No Response	38	No Response	No Response	No Response	No Response	No Response	No Response	No Response	41
Model 1987	2	No Response	No Response	No Response	No Response	0	No Response	No Response	No Response	No Response	No Response	No Response	No Response	2
Model 1988	0	No Response	No Response	No Response	No Response	0	No Response	No Response	No Response	No Response	No Response	No Response	No Response	0
Total	518	818	20	No Response	No Response	251	106	66	74	67	No Response	645	44	2,609